

Active ageing initiatives of older people in civil society: deliverable D5 and WP5 final report of the ActiveAge project "Overcoming the Barriers and Seizing the Opportunities for Active Ageing Policies in Europe". Vol. 1, Report

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Active Ageing Initiatives of Older People in Civil Society

Deliverable D5 and WP5 Final Report of the ActiveAge project
"Overcoming the Barriers and Seizing the Opportunities for Active
Ageing Policies in Europe"
HPSE-CT-2002-00102

Volume 1: Report

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Executive Summary

The subject of this report is civic engagement, voluntary work and self-oriented supportive activities (SOVA) of older people as complement and corrective of different policies which see older people as passive recipients of help and support provided by the members of other generations.

The analysed statistical data from European Social Survey (ESS) and harmonised Time Use Surveys (TUS) reveals strong differences and dramatic disparities in objective life-conditions of older people in Europe. Strong differences were found also with regard to health state, satisfaction, values, and perceptions which determine the readiness of older people for engagement in civil society and for supportive self-oriented voluntary activities.

The examined ESS data shows in a comparative perspective positive perceptions and satisfaction values for older people in Scandinavian countries and Switzerland, and negative perceptions and satisfaction values for older people in Czech Republic, Poland and Italy. The activity levels of older people are generally higher in Norway and Great Britain, and much lower in Poland and Italy. Taking all together, the situation of older people seems to be relatively good in Scandinavian countries, Switzerland and Great Britain and rather bad and unsatisfactory in Poland, Italy and probably also in the Czech Republic with missing activity data.

The analysed TUS data makes this picture more complete by adding the information about time spent in certain activities to the participation rates. The TUS data shows that not all differences in objective life conditions and subjective perceptions of older persons can be explained by the legacies and deficits of past or current political regimes. Regional cultures seem to play also an important role with a more sociable and contact-friendly way of life of Nordic elderly and more domestic, sedentary and passive life-styles of older persons in Central and Southern Europe.

Age disparities and age discrimination are in general much less acknowledged and reflected than disparities and discrimination by gender, nationality and ethnic origin, region and social class.

Today's Europe favours younger generations and can not (yet?!) be an "Europe of all ages". For the moment being, the differences and disparities among European older persons do not cause really serious problems because of the attitudes, reference systems and behaviour of the current elderly. The situation could change quite rapidly with demographic ageing of European societies and other future generations of older people who will be claiming equal rights and equal life-conditions more actively than the generation of today's elderly.

Because of the strong destructive potentials of the ongoing neglect of age discrimination and disparities - these potentials could become virulent e.g. in terms of intergenerational conflicts, further decline of solidarity and social cohesion in European national societies, but also in form of xenophobia, nationalism and growing opposition against the process of European integration - Europe needs an anti-discrimination and equalising policy not only with regard to social class, gender, nationality and ethnic origin, but also to age.

A substantial part of the report is dedicated to ethnographic case studies in SOVA organisations of older people in Norway and Czech Republic. Because only a small number of SOVA organisations could have been selected and analysed, following concluding findings have the status of tentative working hypotheses and need confirmation in further research.

Rich welfare states like Norway provide security and offer good basic services for the majority of older citizen and residents; as a result of it, the voluntary work and civic engagement of older people allows concentration on learning, help to others, solidarity, leisure and self-realisation. In transitional countries like Czech Republic, economy does not allow yet for provisions of security and services at the level of Scandinavian countries. As a consequence, the voluntary work, civic engagement and self-oriented supportive activities of the older people concentrate on self-help and compensation of some provision deficits.

Further on the civic engagement of older people appears to be more immersed in established and formal organisations in the Czech Republic than in Norway. It seems that without a formal institution the Czech elderly are not yet able to organize themselves on the basis of a shared interest. All the activities under study were conducted under the auspices of a formal organization. This is in contrast to the activities studied in Norway, of which three out of four were initiated from below, independently of any formal organisation.

A normative analysis of the possible contribution of SOVA to active ageing policies, active ageing and collective societal goals in general reveals not only positive functions and assets, but also some unrealistic visions, real existing problems and negative aspects.

Less holistic approaches that equate active ageing strategies with maintaining economic productivity expect SOVA, voluntary work and civic engagement of older persons to help to bridge the growing gap between the demand for services and available resources in the ageing societies. In order to fulfil such hopes and expectations, SOVA, voluntary work and civic engagement of older persons will need financial support, professional management and good co-ordination with other pillars of social policy and of the system of social security. Since the necessary changes and reforms require time, SOVA, voluntary work and civic engagement of older people can be seen only as a long-term remedy to the problems of demographic ageing.

Also the other more comprehensive approaches and active ageing strategies which see in SOVA far more fundamental innovative socio-cultural force and social capital of the future age-diverse societies could have not only positive but also problematic consequences. They could lead to the neglect of other forms of civic engagement and prepare ground for new forms of social exclusion, illegitimate claims and externalisation strategies.

Regardless of all these and other open questions and yet unsolved problems: The problems of demographic ageing will make it necessary that Europe and all European countries exploit stronger the indispensable resources and potentials of SOVA, voluntary work and civic engagement and improve the necessary preconditions for pertinent initiatives and activities of current and future older people.

1 Introduction

Objectives and tasks of WP5

This report summarises the work and the results of the Work Package No. 5 (WP5) of the ActivAge 5. FWP research project with following objectives

- to document and classify different types of Self-Oriented Voluntary Activities (SOVA) of the older people
- to analyse and compare SOVA across national borders and to explain pertinent differences
- to assess the potential contribution of SOVA to the achievement of various societal goals and to active ageing
- to formulate recommendations for the division of responsibility and interfaces between policy, voluntary help and SOVA

Unlike active ageing policies which are mostly planned and carried out by actors belonging to other generations, SOVA are prepared and implemented by older people for older people. In addition to this there are also other important differences between active ageing policies and SOVA; e.g. in terms of motives and motivation, need for legitimacy and justification, rewards and benefits, concern for acceptance and opinions of the others, formalisation, etc.

The basic working hypothesis and justification of WP5 is the assumption that analysis of experience from existing SOVA-projects and initiatives will reveal new and important insights. WP5 is meant to complement the policy and "top-down" focus of the other work packages of the ActivAge project. WP2, WP3 and WP4 investigate active ageing policies planned and carried out by different policy actors for the current and/or future elderly; in WP5 we will investigate self-oriented voluntary activities planned and carried out by older people for themselves. Last but not least: The works package will also deal with the life-situation, attitudes, values, perceptions and other activities of older people Europe, which are important determinant of the extent and likelihood of SOVA and influence also the general civic engagement and voluntary work of older people for the whole society.

The WP5 is smaller than the other work packages and only four national teams from Czech Republic, Norway, France and Switzerland participated actively in it. It consists of the four following tasks:

- WP51: Definition and typology of SOVA
- WP52: Collection and analysis of secondary statistical data
- WP53: Collective group discussions with representatives of SOVA-projects
- WP54: Relationship between SOVA and Active Ageing Policies; contribution of SOVA to Active Ageing

Authors and content

Authors

This report has been written and compiled by Michal Arend, Gabriele Gsponer and Martin Baur from **econcept** Zürich under active participation of other members and teams of the ActivAge consortium. Longer individual contributions were written by the following teams and persons:

Chapter 4.1: Self-oriented voluntary activities among older Norwegian. Written by **Dag Stenvoll**, Stein Rokkan Centre for Social Studies, Bergen

Chapter 4.2: Elderly and civil society - Self-oriented voluntary activities for older people in Czech Republic. Written by **Markéta Mrázová**, co-authors **Lucie Vidovičová** and **Ladislav Rabušic**, all from Masarykova Universita Brno, Czech Republic

Chapter 5: SOVA, Civil Society and Active Ageing: Visions and Realities. Written by **Steven Ney**, ICCR Vienna, Co-ordinator of the ActiveAge project

Content of this volume 1

After this short introduction a definition and classification criteria for self-oriented voluntary activities are shown in the next Chapter 2.

In Chapter 3 we present and comment statistical data from European Social Survey (ESS) and Harmonised European Time Use Survey (TUS) as two sources documenting the vast variety and diversity of current older people in Europe.

In Chapter 4 we compare the situation of older people and the prerequisites for self-oriented voluntary actions between Norway and Czech Republic.

In Chapter 5 the report deals with the relation between self-oriented voluntary activities and active ageing policies as well as the possible contribution of self-oriented voluntary policies to active ageing.

Content of the volume 2

Volume 2 of this report contains data and charts from the two surveys (ESS and TUS), which are commented only briefly in the Chapter 3 of the volume 1.

2 Civil society and self-oriented voluntary activities of older people in Europe

Unlike active ageing policies which are mostly planned and carried out by actors belonging to other generations, **self-oriented voluntary activities (SOVA) are prepared and implemented by the older people for themselves or other older people**. This definition and description makes clear that SOVA have a lot to do with concepts like "third sector", "volunteering" and "voluntary work", "self-help", "civic engagement" etc. All these forms and activities together constitute the **"civil society"** as opposition and complement to the state on one and economy on the other hand. The constitutive element which allows distinguishing SOVA from other forms of civil society is the relation between the carrier and beneficiary of the voluntary activity. SOVA can be defined or described by their voluntary character and by the personal or impersonal identity¹ between the carrier and beneficiary. In addition there are also other important differences between active ageing policies and SOVA; e.g. in terms of motives and motivation, need for legitimacy and justification, rewards and benefits, concern for acceptance and opinions of the others, formalisation and the relevance of strategic thinking, etc.

There are many possible **criteria for the classification of SOVA**. They can be classified by

- **sector or area:** e.g. health and care, labour market, culture and art, policy making, environment, leisure and sport, education, coping with modern technologies, ...
- **degree of institutionalisation:** informal vs. formalised
- **stimulus and motivation:** SOVA aiming to overcome deficits and shortages in the sphere of basic needs vs. "surplus" activities in sphere of personal development and self-realisation
- **genesis or the way of their creation:** spontaneous vs. "organised"
- **composition of participants and members** (homogenous-heterogeneous in various respects, above all age, intergenerational projects)
- **degree of support needs:** autonomous vs. subsidised
- **spatial context and levels:** local, regional, national, European, ..
- **by co-operative contacts:** isolated vs. integrated in co-operative structures and networks
- **external relations:** affiliated vs. independent from other organisations
- **orientation:** universalistic/neutral vs. particularistic (based on particular values and beliefs)
- **access and participation possibilities for others:** open vs. closed (exclusive)

From all these above listed classification and distinction dimensions, the first two will be of special importance in the WP5 of the ActivAge-project. By the chosen definition and perspective, the focus of the analysis will be laid on voluntary activities of older people in latter retirement phase of their lives. Not investigated will be the role and part volunteering can play for younger generations and in the transition from paid work to retirement.

¹ "Personal identity" is given when same persons carry out and benefit from the activity. "Impersonal identity" relies to cases, in which elderly do something for other elderly.

3 Analysis of available statistical data from two harmonised European surveys

As already mentioned above, we consider it important to collect and analyse the available secondary statistical data on SOVA - but also on the life situation, attitudes, perceptions and other activities of older people - as necessary complement to qualitative parts and policy oriented approaches of the ActivAge project. One can imagine two different kinds of such data:

Institutional data related to the number of SOVA groups, organisations and initiatives: Such data hardly exists, since nobody really knows the exact number of SOVA groups, organisations and initiatives in different European countries. There is some statistical evidence about the number of formalised or formally registered groups and organisations but it's hardly comparative for different European countries. In addition to the information available about formalised and registered organisation would very often not allow the decision whether an activity is SOVA or not. For this reason we decided to give up the search for meaningful institutional data and concentrate on the below described individual data.

Individual data related to the participation of older people in SOVA, showing e.g. the time spent in pertinent commitments and activities, perceptions of the importance, necessity and contribution of SOVA, motives for participation, personal experience and satisfaction with outcomes and impacts, values and life-styles of participating and not-participating elderly, etc. Such individual data can be found in harmonised international surveys. For the purposes of WP5 we will analyse individual data from two different sources: European Social Survey (ESS) and European Time Use Surveys (TUS).

3.1 Data and findings from European Social Survey¹

The European Social Survey (ESS) is a multi-country survey covering 22 nations. Its twin aims are to monitor and interpret changing public attitudes and values within Europe and to investigate how they interact with Europe's changing institutions, and to advance and consolidate improved methods of cross-national survey measurement in Europe and beyond. The project is funded jointly by the European Commission's 5th Framework Programme, the European Science Foundation and academic funding bodies in each participating country. It involves strict random probability sampling, a minimum target response rate of 70% and rigorous translation procedures. ESS is the only harmonised survey with project-relevant themes and variables, in which all 10 ActivAge participating countries took part. The data is current, since the first round interviews were carried out in 2002. The hour-long face-to-face interview includes (amongst others) questions on media consumption, interest and participation in politics, health state and subjective well-being, individual satisfaction with and perception of importance of different things. Even more important for our project are the questions and answers concerning the individual membership in organisations, participation in activities, donations and voluntary work in different kind of institutions and organisations.

The detailed data and charts with the results and also some information about the wording of the questions are presented in the volume 2 of this report. In the following two tables we have classified the participating ActivAge countries into seven groups;

¹ For general information about ESS see <http://www.europeansocialsurvey.org/>, The questionnaire can be found under <http://www.europeansocialsurvey.org/>.

- countries with values strongly and very strongly (bold) above average;
- countries with values above average;
- countries with values under average;
- countries with values strongly and very strongly (bold) under average;
- countries with average values (not listed)

Table 1: Attitudes and perceptions of older people (all 10 ActivAge countries)

| | strongly above | above | under | strongly under |
|--|--|----------------|----------------|------------------|
| | average in comparison of all ten ActiveAge countries | | | |
| Media consumption | | | | |
| Elderly's consumption of TV | GB, CZ, DE | | AT | CH, PL |
| Elderly's consumption of radio | | CZ, NO, FI, PL | FR | IT (-2.7) |
| Elderly's consumption of newspapers | GB | NO, DE, CZ | PL, FR, CH | IT (-2.2) |
| Elderly's consumption of all 3 media | GB | NO, DE, CZ | PL, FR, CH | IT (-2.2) |
| Political interest and participation | | | | |
| Elderly's interest in politics: | CH, DE | AT | FR, PL | IT, CZ |
| Elderly's political disappointment: | IT, PL | AT, CZ | | NO, CH |
| Elderly's participation in last election: | | NO, AT, DE | CZ, PL | FR (-2.7) |
| Elderly's membership in political parties: | AT, FI | NO, CH | FR, IT, DE, CZ | PL |
| Elderly's position in left-right spectrum: | FI, CZ | | CH | DE, IT |
| Satisfaction with different things | | | | |
| Elderly's satisfaction with life | FI, CH | NO, AT | | PL, CZ, FR |
| Elderly's satisfaction with economy | FI, NO | AT, GB | FR, CZ | PL, DE |
| Elderly's satisfaction with the government | FI (2.0), CH | | IT | DE, PL |
| Elderly's satisfaction with democracy | CH, NO, FI | AT | FR, CZ, IT | PL |
| Elderly's satisfaction with education system | FI (2.2) , AT | NO | FR, PL, GB | DE, IT |
| Elderly's satisfaction with health system | AT, FI | CH | IT, DE, CZ | PL |
| Happiness and social contacts | | | | |
| Elderly's general happiness | FI, CH, NO | | CZ | IT, PL |
| Proportion of elderly with few contacts | PL, CZ | DE | FI, NO, CH | GB |
| Proportion of elderly without close friends | IT (2.1) , FR | CZ | | NO, CH |
| Safety and security | | | | |
| Proportion of elderly crime victims | IT | GB, CH, FI | AT | DE (-2.2) |
| Proportion of elderly feeling unsafe after dark | GB, CZ | DE, PL | | AT, NO, FI |
| Health | | | | |
| Elderly's perceived state of health | CH, GB | NO, AT | DE, IT | PL, CZ |
| Prop. of elderly suffering from serious disability | PL, CZ, FI | GB | IT | CH, AT, NO |
| Perceived importance of different things | | | | |
| Elderly's perceived importance of family | PL (2.7) | | DE, AT | |
| Elderly's perceived importance of friends | NO, FI, GB | CH | PL, CZ, DE | IT (-2.1) |
| Elderly's perceived importance of leisure | FI (2.5) | GB, AT | CZ, PL | FR, IT |
| Elderly's perceived importance of politics | DE, AT | CH | FR, FI | PL, CZ |
| Elderly's perceived importance of work | IT | AT | NO | GB (-2.6) |
| Elderly's perc. importance of religion + church | PL (2.0) , IT | FI | FR | CZ, GB, NO |
| Elderly's perc. imp. of voluntary organisations | IT | NO, CH | GB | PL, CZ |

Table 2: Activities of older people (8 countries, no data for Switzerland + Czech Republic)

| | strongly above | above | under | strongly under |
|---|---|----------------------|------------------------------|---|
| | average in comparison of eight of the ten ActiveAge countries | | | |
| older men: sport and outdoor older women: sport and outdoor | DE GB, NO, DE | NO, GB | FR | IT, PL PL, IT |
| older men: culture and hobbies older women: culture and hobbies | GB NO | FR, DE FR, GB | FI | IT, PL PL, IT |
| older men: trade union older women: trade union | IT, FI NO, IT | AT | FR GB, FR, PL, FI | PL, GB |
| older men: business and profession older women: business and profession | IT (2.5) DE (2.1) | GB | PL, FR, NO NO, IT, PL | |
| older men: consumer + automobile organis. older women: consumer + automobile organis. | GB, FR AT (2.3) | NO DE | IT PL, FR, GB | PL, FI |
| older men: humanitarian aid older women: humanitarian aid | GB FI | AT, DE, IT NO, FR | | PL (-2.1), FI PL, IT, AT |
| older men: environment and peace-keeping older women: environment and peace-keeping | GB, AT AT, GB | DE | NO, PL, FR FI | IT PL, IT |
| older men: religion and church older women: religion and church | GB GB, FI | FI, AT NO | NO PL, AT, FR | PL, IT IT |
| older men: political parties older women: political parties | DE, AT NO, AT | FR, DE | IT, GB, FI FI | PL PL, IT |
| older men: science and education older women: science and education | DE, AT, GB AT, GB | | FR, NO, IT NO, FI, IT, PL | PL |
| older men: clubs and social activities older women: clubs and social activities | NO, GB NO (2.2) | FR | FI FI, AT | PL PL, IT |
| older men: voluntary organisations older women: voluntary organisations | AT NO, GB | GB | PL, AT | IT, PL IT |
| older men: participation index older women: participation index participation index all elderly | GB, DE NO, GB GB, NO | AT DE | | PL (-2.2), IT PL, IT PL (-2.6), IT (-2.0) |

In the aggregated participation index, all listed activities are taken into consideration with equal importance without any weights. For this participation index we have also investigated the disparities with regard to gender, income and region. The extent of gender disparities is above average in Germany and Italy, under average in Finland and strongly under average in Norway¹. The extent of income disparities is above average in Finland and Norway, under average in Italy and France, and strongly under average in United Kingdom/Great Britain². The extent of regional (urban vs. rural) disparities is strongly above average in Austria, under average in Great Britain and strongly under average in Germany³.

¹ This means that in Germany and Italy the difference between the participation of older men and older is positive; older men participate stronger than older women taking into account all covered activities. On the contrary in Finland and above all in Norway older women are more active than older men.

² The difference between the overall participation of the poor and rich older people is relatively small in Finland and Norway and relatively large in Italy, France and above all in the UK.

³ The difference between the overall participation of older people from urban and rural areas is relatively strong in Austria with urban older people more active. Relatively weak is this difference between older people in urban and older people in rural areas in the UK and above all in Germany.

The differences between the older people and other younger generations will not be investigated and commented in general - the pertinent data and charts can be seen in volume 2 of this report - but only in connection with concrete four examples.

Comments to the first example and chart "Political disappointment": In this first chart and example we can see that in all 10 countries older persons are more disappointed about the policy and the politicians than the member of younger age groups. Pertinent differences are very strong in Scandinavian countries and also in Switzerland as countries with the weakest general political disappointment. The political satisfaction/disappointment in these countries is "age-selective" and in contrast to the perceptions of younger generations. On the other hand the differences between the age groups are not so strong in countries where there is the strongest general disappointment (Poland, Czech Republic and Italy).

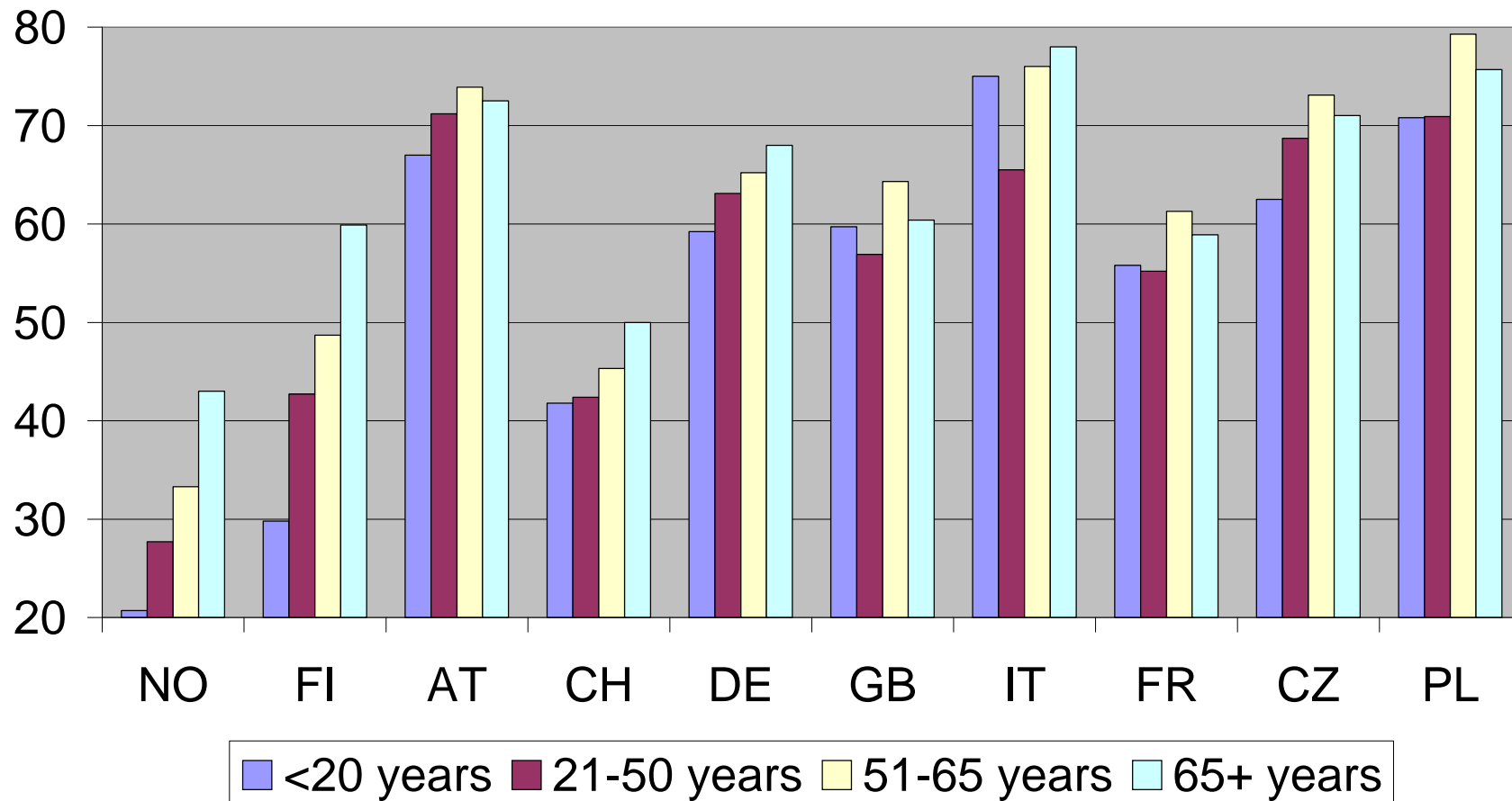
Comments to the second example and chart "General happiness": The second chart and example shows that in Italy, France, Poland and Czech Republic the feeling of general happiness and satisfaction is diminishing in the course of life whereas in other countries with a commonly higher level of general happiness (Norway, Finland, Switzerland) this phenomena does not occur. GB seems to be the only European country in which older persons in the age group of 65+ are generally happier in higher age than the younger ones.

Comments to the third example and chart "Perceived state of health": The third chart and example shows very large differences in the subjective state of health - Switzerland and Great Britain are at the top and Czechs and Poles feel worse - with a general European pattern of a strong increase of complaints and negative self-perceptions in the course of life and specially after the age of 50 years. This increase is however less steep in Scandinavian countries, Switzerland and Great Britain and much stronger in Germany, Italy and - above all - in Poland and Czech Republic.

Comments to the fourth example and chart "Participation index": This fourth chart and example is probably the most important for our work since it shows the values of an non-weighted additive participation index calculated for 12 different spheres (see Table 2 above) of collective activity. This index could computed for six countries only, since the pertinent ESS-questions were not posed in Switzerland and Czech Republic, but for the remaining eight countries there is a general pattern of a decreasing participation and activity in the course of life which is some countries continuous and in some others like Finland and UK starting only at the age of 65 and more. A second prominent find are the huge differences in general participation levels with Norway and Great Britain at the top and Poland and Italy having the least active population.

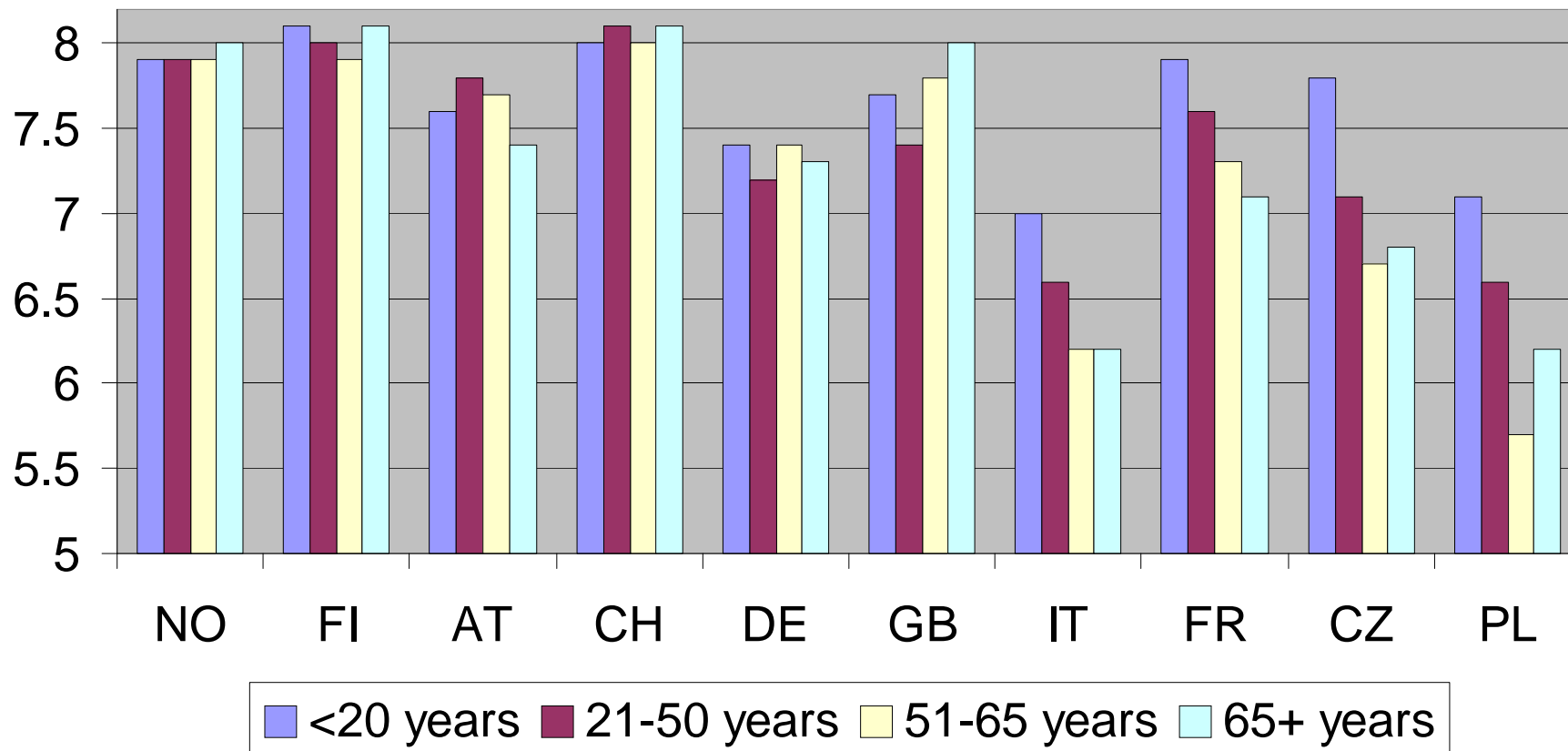
Example 1: Political disappointment

Politically disappointed persons by age



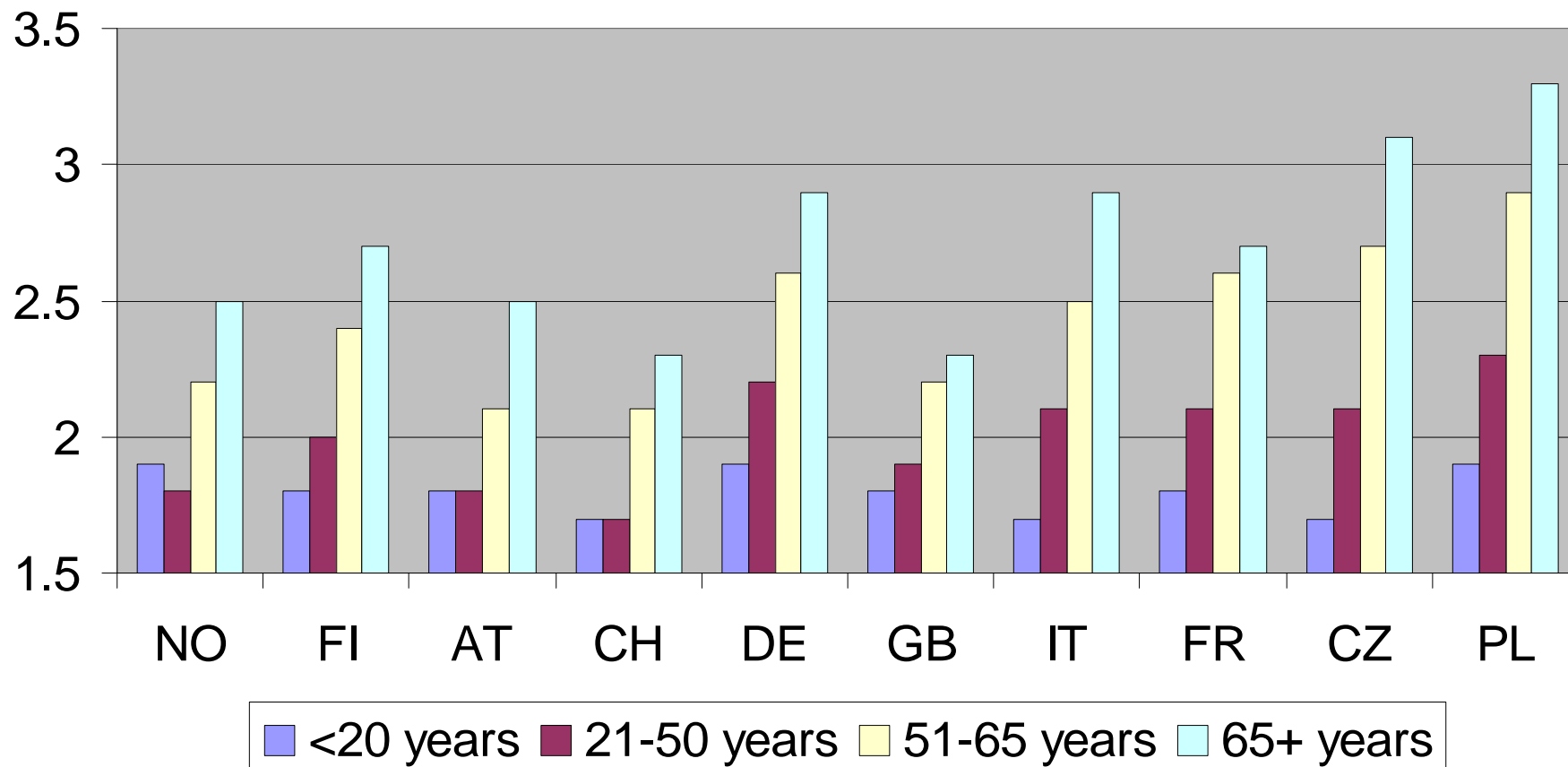
Example 2: General happiness

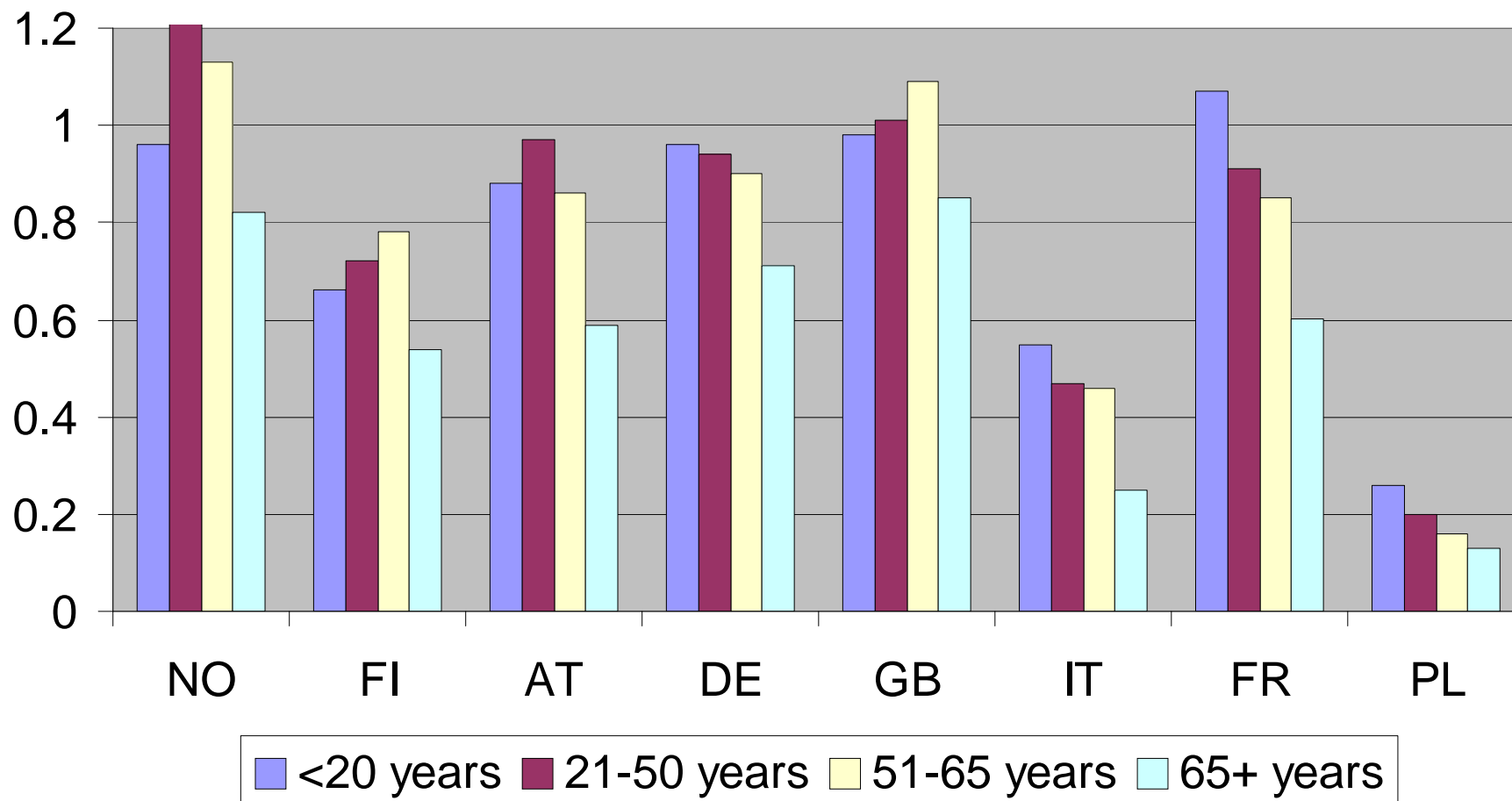
General happiness by age (0 = extremely unhappy, 10 = extremely happy)



Example 3: Perceived state of health

Perceived state of health by age (1 = very good, 5 = very bad)



Example 4: Overall participation index**Participation by age (Aggregate index for various activities)**

In the following paragraphs we will present some possible explanations and interpretations for the differences and findings based on the ESS-data. The three following selected texts were formulated by the national teams of the ActiveAge project - trying to explain the differences and findings - and slightly shortened by Michal Arend as the main author of this report:

Insights, explanations and interpretation attempts of the ESS-results for CZECH REPUBLIC

Older people in Czech Republic are known for having no active and conscious program for their retirement life. TV consumption is the easiest way how to spend time. The low general satisfaction of older people in Czech Republic has to do with huge numbers of older persons who feel subjectively poor in economic terms. The feeling of lacking security and safety is new and a real problem: TV and other media are full of examples of the elderly who were robbed or attacked. The elderly are not used to this, and say, under Communists, we felt safe...

The bad health status of the elderly goes back to the bad public health system under the communist regime. Czech elderly were also not used to take care of their health by themselves - ideology was telling them that medical care is free... Especially health status of male elderly was quite bad in the 1980s. Only during the 1990s we record an improvement - left life expectancy of Czech males increased quite substantially.

Czech elderly have not known the concept of "civil society", they are not used to the fact that voluntary organisations can help enormously in getting things right at the local level. The elderly were raised in a belief that everything is solved by the Central Bureau of the Communist party (in the 1980s, the Central Bureau even used to make decisions how to bring oranges and tangerines for Christmas into the former Czechoslovakia ...)

Insights, explanations and interpretation attempts of the ESS-results for POLAND

The changes in the political scene since the beginning of the transition undermine people's beliefs in political systems. People in Poland, in general, are not very satisfied with democracy in which parties are often changing, politicians quarrel, and are perceived as not very eager to meet their pre-elections promises.

In fact the income of households of persons aged 65 and over is not as bad in comparison with other types of households, i.e. unemployed, which is rather exceptional. On the other hand, many studies have proven that citizens in the new EU member states have more critical view of the quality of economy public services (education, pension and health care systems, and social services).

Older people were exposed to rapid social changes caused by transition from communist economies to capitalist ones. For some, their merits and beliefs have been depreciated, which had an influence on ratings of life satisfaction and happiness. In all post-communist countries, older people are generally least satisfied with their lives in comparison to other age groups (in contrast to e.g. EU15 where there is usually not such a difference).

Generally low participation index of older people could be the result of two things. First cause is the worse health status of this age group in comparison to other AA countries. Second, in the communist times 'voluntary actions' and participation in different organisations were obligatory or at least very encouraged by communist party. So some people can prefer now - when they are free to choose - to undertake different actions rather within family than in an organisation.

Insights, explanations and interpretation attempts of the ESS-results for NORWAY

Political interest and participation: As can be seen Norwegian elderly score above average on participation in last election and membership in political parties, they are also strongly above average satisfied with democracy. This goes together with low political disappointment. In addition consumption of radio and newspaper is above average and may be interpreted as indicating a general interest in being informed on social and political issues (there was a separate question on how much time was spent on news and radio programs on political and current social issues, A4 in the ESS, that we could have substantiated this). Older people in Norway have experienced long periods of economic growth that have been distributed in a fairly egalitarian way so as to benefit most groups. The means of this have been among other factors public institutions that have been effective in making a difference to people's life in terms of opportunities and outcome, through work and income security. In itself such positive outcomes may in its turn reinforce interest and participation and create trust in public institutions.

Satisfaction with things: The post-war policy of full employment policy and integration into the world economy have provided elderly Norwegians with long periods in gainful employment (unemployment have been low, expansion of public sector has secured employment careers for women) and real wage growth. This stability of employment career has been converted into build up of wealth and assets (particularly important has been investment in homeownership) and reasonable pensions to draw on in old age. Thus especially two earner household of older persons enjoy satisfactory economic situation.

Happiness and social contacts: Since older people are strongly above average satisfied with economy and democracy, are satisfied with politics strongly above average, value friends and have friends, feel generally safe, this should contribute in explaining the high score on happiness. High participation rates in working life both for women and men opens up possibilities for meeting other people and establishing contact and networks that may extend beyond the sphere of working life. In a similar manner high activity rates outside work in voluntary organisation etc. enhances possibilities for making friendship and networks.

Health: We suppose that the good health status of the Norwegian elderly and low number of older people complaining about serious health problems has two main causes: A universal public health system providing everyone fairly good health services independent of economic status and so increases opportunity for more people of avoiding disability through preventive measures and/or having medical treatment to rectify or soften the effects of disability, an active engagement of people through the walks of life, including the third age that may have a preventative effect. This could also be related to a positive conception of freedom as central in the ideology of the welfare state in the Nordic countries, i.e. that people need to be provided with resources in order to be autonomous and act more freely. An example would be help to disabled people with transport etc. that facilitates contact and communication with others. Thus instead of taking responsibility away from people (as seems to be the legacy of the communist state experience in Czech Republic) a state organised universal system of health may provide people with opportunities to participate and take responsibility.

Perceived importance of different things: A general explanation is that modernisation and mobility have reduced the importance of traditional institutions such as the family and church in social life and enhanced the importance of more individualised forms of social life. The importance of friendship goes back to the fact that people spend more time in work relations and leisure activities outside of home.

Activities of older people: In general the strongly above average activities as reflected in the participation index at the end of the table could be interpreted as expressing a high stock of social capital. One important explanation of this point to be historically important role of broad based voluntary organisations in Norway especially within the welfare sector; they were often service providers and was basically other oriented, ie. in contrast to SOVA, but also in religious organisations. In many of these organisations women were particularly active and constituted a majority of membership. To some extent the higher activity rates of women as compared to men may reflect this historical experience of generations of active women that now have come into old age and continues to be active. A key in understanding the role of these voluntary organisations concerns the relation of these voluntary organisations and the state. In Norway the voluntary organizations have represented a main force in the ideological and organizational transformation towards increased public responsibility in the welfare sector". This in contrast to the description of the relationship (or rather a non-relationship) between state and voluntary organisation under communism in Czech republic, i.e. a historical legacy that is making it's impact also today where conflict and distance between state and voluntary organisations seems to be characterising the relation (see Czech WP5 report). Thus in "state friendly" country such as Norway there has been a situation of extensive cooperation and integration between government and voluntary organisations that seem to have been mutually beneficial for both government and voluntary organisations in terms of build up of mutual trust and legitimacy. But clearly these relationships are dynamic and contingent and may change in both countries in the future.

3.2 Data and findings from Time Use Surveys

What remains unsatisfactory about the ESS data presented and commented in the previous Chapter 3.1 is the fact that there are no real time use questions/data showing average efforts in hours and minutes in this survey, but only yes-no question on the occurrence of certain activities within the last 12 months allowing only the calculation of collective participation rates. In order to compensate this deficit and complement the data about the participation rates, we include also some actual data on time spent in certain activities. This data stems from the 2004 pocketbook edition "How Europeans spend their time. Everyday life of women and men". The pocketbook shows how women and men organise their everyday life in 10 European countries Belgium, Germany, Estonia, France, Hungary, Slovenia, Finland, Sweden, the United Kingdom and Norway. Results are also available for Denmark, Romania, the Netherlands and Portugal but the survey methods used in these countries deviate from the European guidelines and comparable results could not be produced. Results from Bulgaria, Italy, Latvia, Lithuania and Spain will be available in the near future and those from Poland and Slovakia are due within a couple of years.

Detailed tables with the TUS data and results can be found in volume 2 of this report. In this Chapter we will just show the most significant deviations from the average of 10 investigated countries (more data and findings can be found in Table 3 on the next page) and comment again four selected examples¹. In difference to the previous chapter dealing with ESS-data we will concentrate on the oldest age group of 65 and more years and on the gender differences between men and women in this case.

Comments to the fifth selected chart and example "Older people and time spent at home": With a day having 1440 minutes we can see that older women in Hungary and Slovenia almost do not leave their homes. Germany, Norway and Sweden are the three countries in which both men and women spent least time at home. The Estonian data shows that the home attachment and sedentary life of the Hungarian and Slovenian elderly has probably more to do with regional lifestyles and can not be explained by the lack of economic means or as a legacy of former political regime. The values of Estonian men and women are more similar to those of Sweden and Norway and complement a picture of different more out-house oriented life style of older people in Nordic countries.

Comments to the sixth selected chart and example "Participation rate of older people in employment": In all 10 compared countries older men are employed more frequently than older women with an approximate ratio of 2:1. More than 3:1 is this ratio in Norway, where more than 12% of older men are still employed. Surprisingly many older men are also still employed in Slovenia and in Estonia probably because they have to work due to economic reasons. The labour market participation rates of older men and women are very low in France, Germany and above all in Belgium on the other hand.

¹ We show only 1 example of time data and 3 of participation rates since they are easier to understand. But the time data for the examples with the participation rates show the same picture; there is a strong positive correlation between the data on time and data on participation rates.

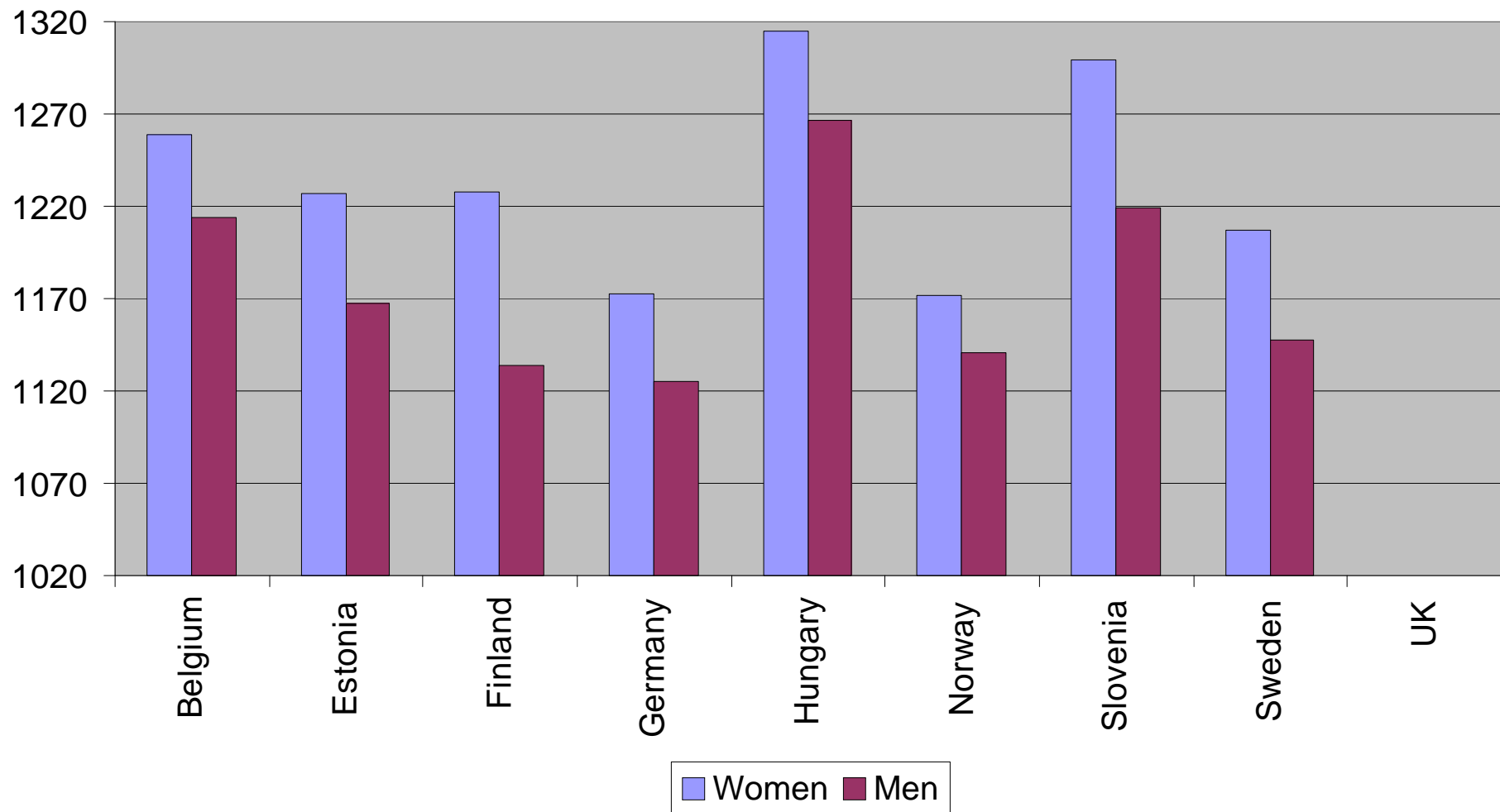
Comments to the seventh selected chart and example "Participation rate of older people in education and study": Germany, Sweden, UK and Belgium are the countries with the highest participation rates of older people in education and study. The differences to the participation levels of the other four countries with available data (Estonia, Finland, France and Hungary) are striking. In Germany and Belgium more older men participate in education and study than women - in Sweden and UK the female participation rates are higher. In Hungary the participation of older women in education and study is almost inexistent with a level of less than 1 out of hundred qualifying for the comparable TUS-European standard.

Comments to the eight selected chart and example "Participation rate of older people in voluntary work and help": The last chart and example has to do with voluntary work and help and is again very close to SOVA as the subject under investigation in this work package. In most of the ten compared countries the gender differences between older men and women are not very significant with exception of Germany and Sweden - where a higher percentage of men participates - and Norway with a much higher participation of older women. Sweden is a leader in this respect and the values of Hungary and Slovenia are very low. The Estonian values show again that the low participation rates of Hungarian and Slovenian can not be interpreted by the sole legacy of the real existing socialism only.

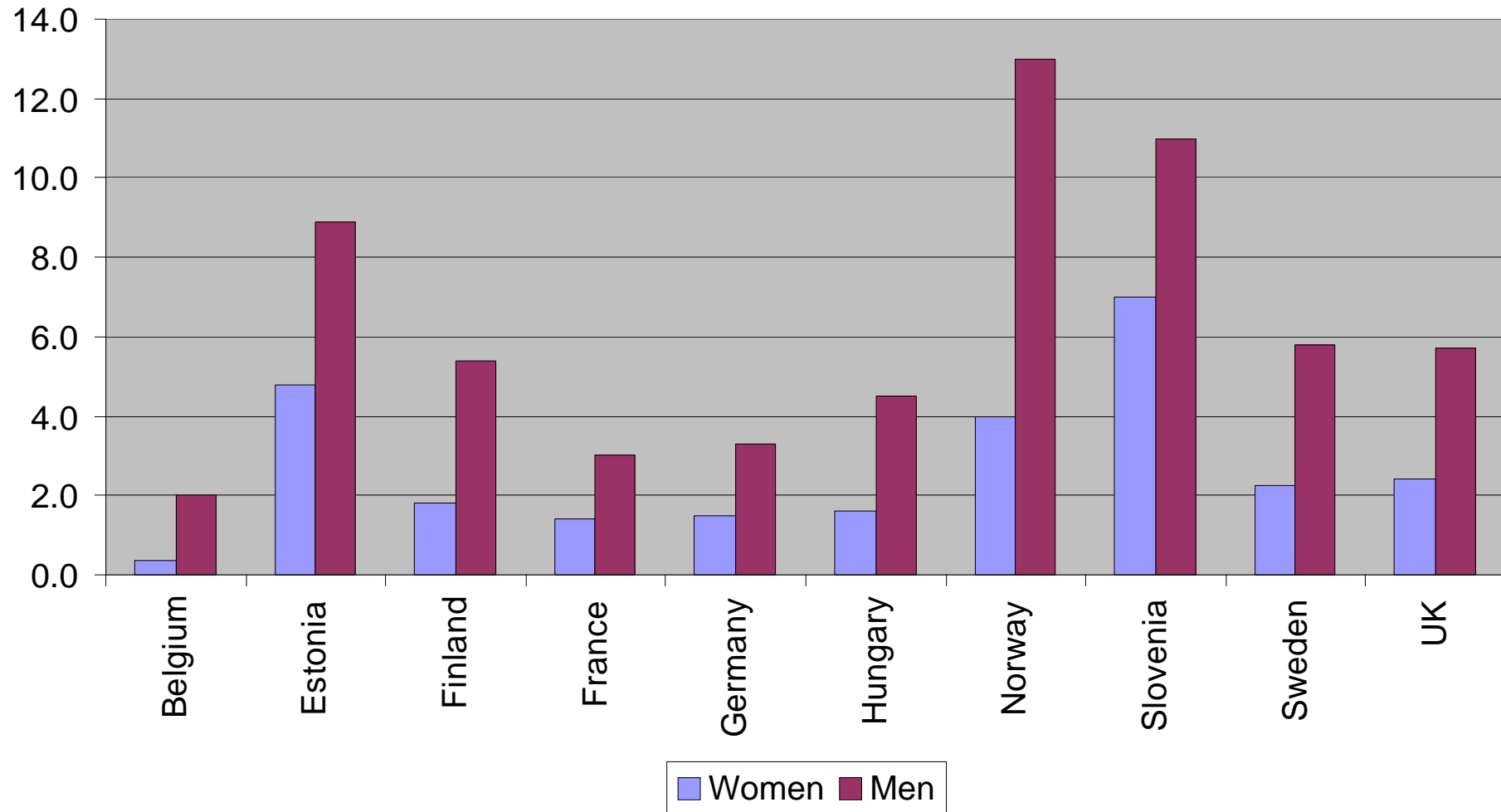
Table 3 with harmonised time-use data (Belgium (BE), Estonia (ET), Finland (FI), France (FR), Germany (DE), Hungary (HU), Norway (NO), Slovenia (SL), Sweden (SE) and UK)

| | strongly above average in comparison of the 10 above mentioned countries | above | under | strongly under |
|--|---|----------------|----------------|----------------|
| older men: personal care and sleep, time | FR | HU | FI, SE, UK | NO |
| older men: personal care and sleep, particip. rate | no differences found, 100% participation rates everywhere | | | |
| older women: personal care, time | FR | BE | FI, SE, UK, NO | |
| older women: personal care, participation rate | no differences found, 100% participation rates everywhere | | | |
| older men: employment, time | SL, NO, ET | | DE, FR | BE |
| older men: employment, participation rate | NO, SL, ET | | DE, FR | BE |
| older women: employment, time | SL, ET | NO | GE, FR | BE |
| older women: employment, participation rate | SL, ET | NO | GE, FR | BE |
| older men: education and study, time | BE, DE | SE | HU | ET |
| older men: education and study, part. rate | DE, BE | SE | HU, ET | FR |
| older women: education and study, time | SE | DE | ET | HU |
| older women: education and study, part. rate | SE, DE | UK | | FR, HU |
| older men: domestic work, time | no significant differences found | | | |
| older men: domestic work, participation rate | | NO, UK, SE, DE | ET, HU | SL |
| older women: domestic work, time | | SL, ET | FI | |
| older women: domestic work, participation rate | no significant differences found, almost 100% part. rates everywhere | | | |
| older men: voluntary work and help, time | FI, DE, FR | ET, SE | BE | SL, HU |
| older men: voluntary work and help, part. rate | SE | DE | NO, SL | HU |
| older women: voluntary work and help, time | | SE, DE, FR, NO | BE, HU | SL |
| older women: voluntary work and help, part. rate | SE, NO | UK, DE | BE | SL, HU |
| older men: leisure, time | no significant differences found | | | |
| older men: leisure, participation rate | | SE, UK, DE | FR | |
| older women: leisure, time | | FI, NO, SE, UK | SL, FR | |
| older women: leisure, participation rate | | DE, SE, UK, NO | FR | |
| older men: travel time | | DE, SE, BE, UK | FR | |
| older men: travel, participation rate | | SE, UK, DE, NO | FI, FR | |
| older women, travel time | DE | UK, SE | HU, SL | FR |
| older women: travel, participation rate | | DE, SE, UK, NO | FR | |
| older men: time spent at home | HU | BE, SL | SE, NO | FI, DE |
| older women: time spent at home | HU, SL | | DE, NO | |
| older men: time spent at work or school | NO, SL | ET, HU | DE, FI | BE |
| older women: time spent at work or school | | SL, NO, ET | DE, BE | |
| older men: time spent at other people homes | | FI | ET | |
| older women: time spent at other people homes | NO | | SL | |
| older men: time spent at restaurants, cafés, ... | BE, UK | DE | SE | ET |
| older women: time spent in restaurants, cafés, ... | | BE, DE, UK | SE, ET, HU | |
| older men: time spent travelling | | DE, NO, SL, UK | FI, HU | |
| older women: time spent travelling | | UK, DE | FI, HU | |

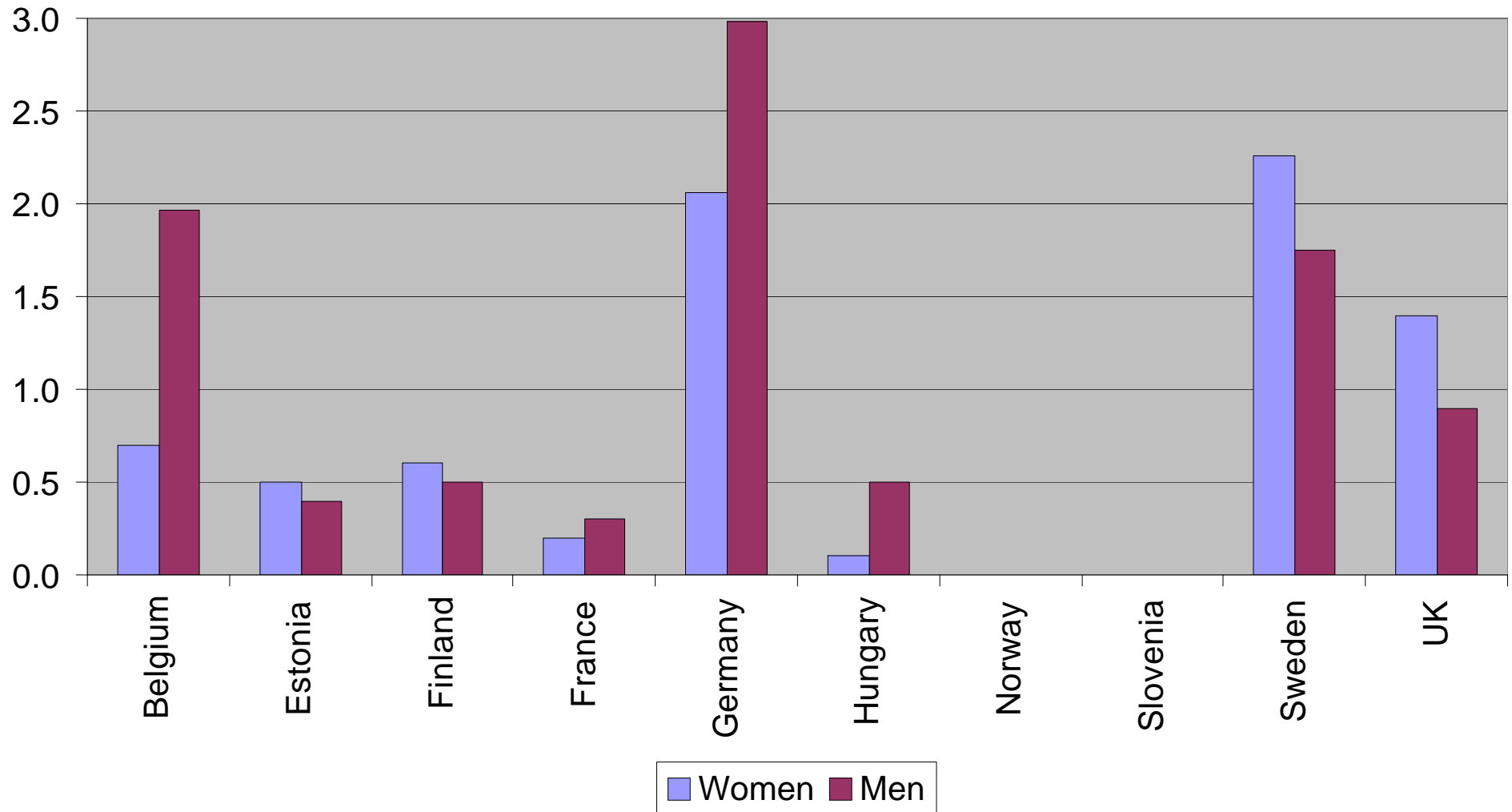
Time spent at home (65+, in minutes, per average year day)



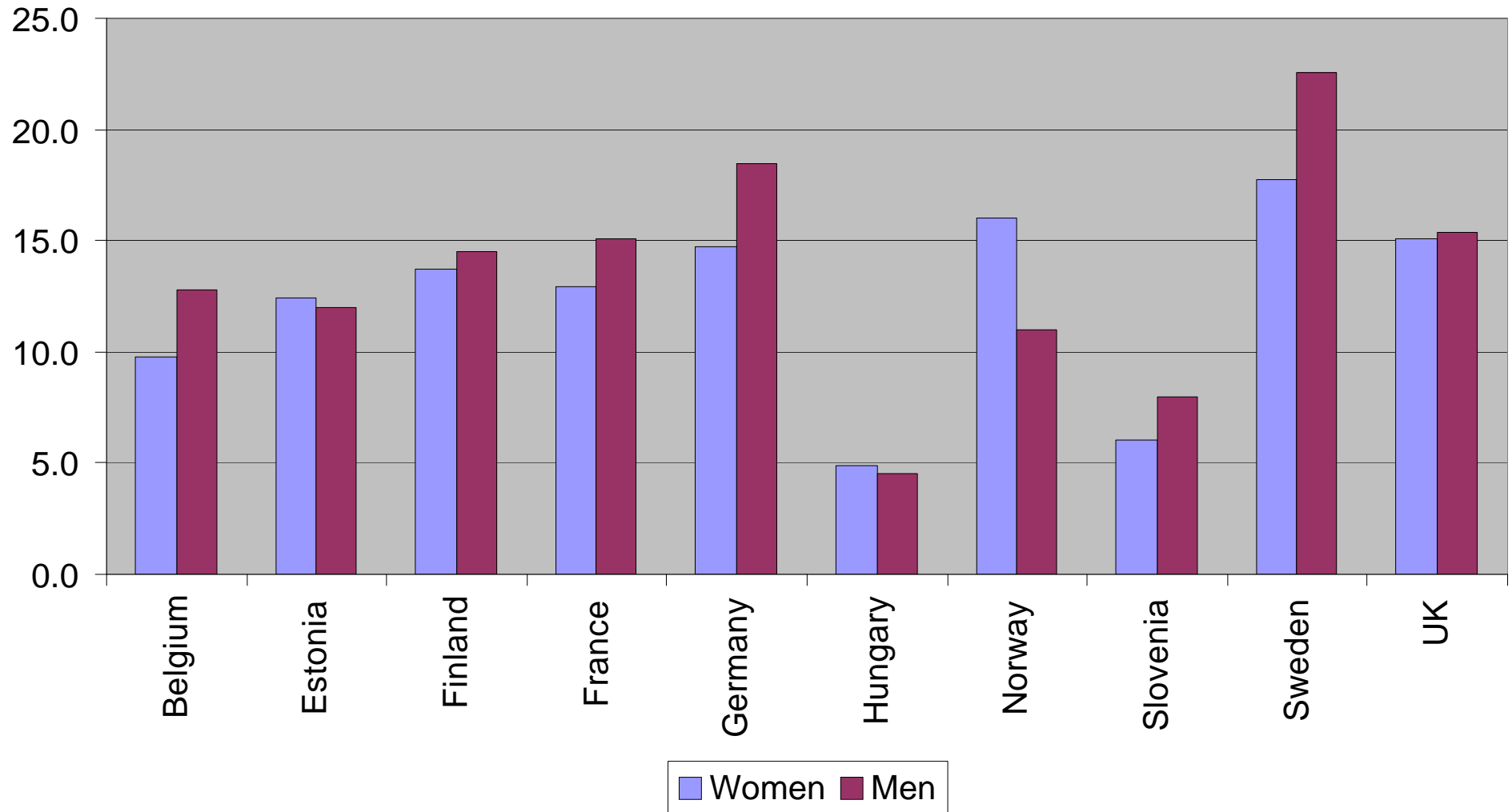
Employment rate of older people (65+) in %



Participation rate (in %) of older people (65+) in study and education



Participation rate (in %) of older people (65+) in voluntary work and help



3.3 Conclusion: Strong differences and dramatic disparities among older people in Europe

The analysed data from ESS and TUS survey show strong differences and dramatic disparities in objective life-conditions of older people in Europe. Strong differences have been found also regarding the investigated value judgments, satisfaction, perceptions also with regard to their readiness for engagement in civil society and supportive self-oriented voluntary activities. On a whole and in a comparative perspective the examined ESS-data show positive perception and satisfaction values for older people in Scandinavian countries and Switzerland, and negative perceptions and satisfaction values for older people in Czech Republic, Poland and Italy. The activity levels of older people are generally comparatively high in Norway - especially for women - and Great Britain, very low in Poland and Italy. Taking all together and on the basis of the examined ESS-data, the situation of older people seems to be good and satisfactory in Scandinavian countries, Switzerland and in Great Britain; and rather bad in Poland, Italy and also in the Czech Republic with missing activity data.

| Main ESS findings on the age group of 65+ | high, good | low, bad |
|--|---------------------------------------|-----------------|
| media consumption (in %) | UK | IT |
| political interest and participation (in %) | CH, DE, AT | FR, CZ, PL |
| contacts, friends, sociability (in %) | NO, CH | PL, CZ, IT |
| satisfaction (in %) | FI, NO | PL, CZ, IT |
| health (in%) | CH, NO | PL, CZ |
| activities, societal participation (in %) | GB, NO _f , DE _m | PL, IT, (CZ) |

The TUS data makes this picture more complete by adding time data to the data on participation rates. It shows that not all differences in objective life conditions and subjective perceptions of older persons can be explained by the legacies and deficits of past or current political regimes. Regional cultures seem to play also an important role with a more sociable and contact friendly way of life of Nordic elderly and more domestic, sedentary and passive life-styles of older persons in Central and Southern Europe.

| Main TUS findings on the age group of 65+ | high | low |
|---|---|------------|
| personal care and sleep (time) | FR | FI, NO, SE |
| employment (time and participation rates in%) | SL, NO, ET | FR, BE |
| education + study (time + participation rates in %) | SE, DE, BE _m , UK | FR, ET, HU |
| voluntary work and help (time) | FI _m , FR _m , DE _m | SL, HU |
| voluntary work and help (participation rates in %) | SE _m , NO _f | SL, HU |
| travel and mobility (time) | DE, NO, SL, UK, BE (all men) | FI, HU |
| travel and mobility (participation rates in%) | DE, NO, SE, UK | FR |
| time spent at home | HU _f , SL _f , HU _m | DE, NO |
| time spent at other people homes | NO _f | BE, SL, HU |
| time spent in restaurants, pubs, ... | BE _m , UK _m | SE, ET |

In spite of the strong heterogeneity among current older people in Europe: Many current older people are transition, change and modernisation losers and need more care and support. Age disparities and age discrimination are in general much less acknowledged and reflected than disparities and discrimination by gender, nationality and ethnic origin, region and social class. The relative neglect of age discrimination and disparities is stronger at the European level than in the most European countries.

Today's Europe favours younger generations and can not (yet?!) be an "Europe of all ages". For the moment being, the above listed differences and disparities among European older persons do not cause really serious problems because of the attitudes, reference systems and behaviour of the current elderly. The situation could change quite rapidly with demographic ageing of European societies and other future generations of older people who will be claiming equal rights and equal life-conditions more actively than the generation of today's elderly.

Because of the strong destructive potentials of the ongoing neglect of age discrimination and disparities - these potentials could become virulent e.g. in terms of intergenerational conflicts, further decline of solidarity and social cohesion in European national societies, but also in form of xenophobia, nationalism and growing opposition against the process of European integration, Europe needs an anti-discrimination and equalising policy not only with regard to social class, gender, nationality and ethnic origin, but also to age.

4 Comparison between Norway and Czech Republic

In this longest chapters we report about the results of ethnographic case studies in SOVA organisations in Norway and Czech Republic. These two countries are different in many respects - historically, culturally, economically, socially, with regard to the political conditions and regulatory framework for ageing policies etc. - and we want to show, that these differences affect and shape the conditions and readiness for voluntary work, civic engagement and self-oriented voluntary activities of older people. In a stereotypical and oversimplified manner, we expect the conditions for voluntary work and civic engagement to be good/better in Norway and difficult/worse in Czech Republic. Rich welfare states like Norway provide security and offer good basic services for the majority of older citizen and residents; as a result of it, the voluntary work and civic engagement of older people allows concentration on learning, help to others, solidarity, leisure and self-realisation. In transitional countries like Czech Republic, economy does not allow yet for provisions of security and services at the level of Scandinavian countries. As a result of it, the voluntary work, civic engagement and self-oriented supportive activities of the older people concentrate on self-help and compensation of some provision deficits. The main ex-ante expected differences between Norway and Czech Republic are shown in the following table:

| The situation in Norway (in relative terms in comparison with Czech Republic) | The situation in Czech Republic (in relative terms in comparison with Norway) |
|--|---|
| Older people are frustrated by the "problem and burden perspective" of the actors and other generations in the first place. | Older people are frustrated by deficits in social security and by their unsatisfactory economic situation in the first place. |
| More older people are aware of the importance of self-organisation and articulation of interest in democratic societies. | Less older people are aware of the importance of self-organisation and articulation of interest in democratic societies. |
| Many active older people with feeling of self-responsibility and with experience and know-how in voluntary work and civic engagement. | Many passive and "fatalistic" older people without feeling of self-responsibility and without experience and know-how in voluntary work and civic engagement. |
| High (but diminishing) identification of the older people with the state and its collective values. | Low (but possibly not further decreasing) identification of the older people with the state and its collective values. |
| Rich welfare state providing security and offering good basic services for the majority of older citizen and residents; as a result of it, the voluntary work and civic engagement of older people allows concentration on learning, help to others, solidarity, leisure and self-realisation. | Poorer transitional state, economy and society with shortages and deficits hindering the provision of security and basic services for the majority of older citizen and residents; as a result of it, the voluntary work and civic engagement of older people requires concentration on self-help and compensation of the worst provision deficits. |
| Good policy debate and public discourse on ageing, reasonable and functional interface between policy, help and voluntary work/civic engagement. | No real policy debate and public discourse on ageing, and only first rather arbitrary steps to the co-ordination between policy, help and voluntary work/civic engagement. |
| Higher degree of formalisation and institutionalisation of voluntary work and civic engagement. | Lower degree of formalisation and institutionalisation of voluntary work and civic engagement. |
| Smaller differences in voluntary work/civic engagement between regions and socio-economic groups with regard to social class, gender, age. | Larger differences in voluntary work/civic engagement between regions and socio-economic groups with regard to social class, gender, age. |

In order to test these ex-ante differences and hypotheses several ethnographic case studies in form of participant observation and collective group discussions with leading representatives of the respective SOVA activities were conducted in the two countries. In the following two chapters 4.1 and 4.2 the country responsible persons report about the results. Since we assume that the majority of the readers of this report will not be familiar with the situations of SOVA in transitional post-communist new EU member states, we asked the authors of the Czech report to place their case studies into a broader context and report also about some basic characteristics of the civil society, non-profit sector and voluntarism in this country.

4.1 Self-oriented voluntary activities among older Norwegians

Written by Dag Stenvoll, Stein Rokkan Centre for Social Studies, Bergen

This paper tentatively presents the Norwegian partial study of WP5, on self-oriented voluntary activities among the elderly. After going through the central aims of this study, as laid out in the original ActiveAge project plan and as modified at later general meetings, I present methodology and the selection of cases. Then I briefly describe the four cases, before I proceed to the most important findings from the focus group interviews and compare the Norwegian situation from what we have learned about similar activities in Czech Republic.

Active ageing and self-oriented voluntary activities

A central idea of active ageing policy is to try to approach the challenges of an ageing population by reducing the demand for social and medical services, rather than concentrating on the supply. Related to this perspective are efforts to make the elderly more independent, to focus more on preventative instead of curative and ameliorative health care, and to increase individual responsibility among the elderly (in other words, more self-regulation).

The initial goal of this work package on self-oriented voluntary activities, of and for the elderly, was quite ambitious. By looking at active ageing initiatives within civil society, it was hoped that potentials for social innovation and policy learning at the micro-level could be identified (project plan, part B, p. 6). In this study, special attention has been given to the genesis, constitution and organisation of projects, to the motivation of organizers and participants, to obstacles which have had to be overcome, to support needed to overcome obstacles, to results of initiatives, and to responses in the media and the public. In addition, the participants in group interviews were asked about ageing discourse and policy for the elderly in general (see appendix for a full interview guide).

The four selected cases vary when it comes to involvement from others than the participants themselves, but all of them can be described as 'self-oriented voluntary activities'. They were selected to cover four types of activities/initiatives, agreed upon by the international project group:

- Health care (Pensioner Hiking Group - PHG)
- Life-long learning and coping with new technologies (Senior University - SU)
- Culture and art (Queen of Hearts Bridge Club - QH)
- Voluntary work for community, public organisations, etc. (Tuesday Club - TC)

Initially, a fifth category, of intergenerational projects, was to be included in the typology. This category was, however, difficult to delimit from voluntary projects in general: It doesn't follow the 'by and for' the elderly criteria. It was therefore pragmatically decided to leave out the intergenerational category. Nevertheless, it could have been especially interesting to look at such initiatives, since they resist the temptation to segregate the elderly into one group. As will be discussed briefly in the conclusion, such a strategy of non-segregation might be the most effective in policies crafted to ensure an active elderly population.

Methodology and data

Due to the limited time frame of the project, it has not been realistic to map out all self-oriented voluntary activities for the elderly in Norway in any systematic way. Instead, focus is put on the Bergen area, where it was possible to get an overview of the activity field. Information was gathered through searching the Internet, through various publications for the elderly, and through direct e-mails to persons involved in voluntary activities. During my participant observation and the focus group interviews, I also got some additional information on existing activities.

One of the selected activities (SU) is based in the centre of Bergen, one (PHG) is administratively based in the centre but the activities themselves take place in forests and mountains around Bergen, and the last two (QH and TC) are located in a suburb of Bergen.

The data collection went through three stages. In the first stage, the responsible for the activity was sent a letter, shortly presenting the ActivAge project and asking for access to the activity, and then contacted by telephone. The conversations on the phone varied in length, from about 2 to about 15 minutes. The contacted persons were all very forthcoming, and we agreed on a day when I could attend their activity.

The second stage consisted of a day's participant observation at the activity. The purpose of this contextualization was to get a first-hand experience of the activity taking place, to talk informally to participants, and to recruit persons for a focus group interview. I also think that participating in this way made it easier to conduct group interviews in the third and last stage, since I already had some basic information to bring up in interviews, and as a contrast to what was being said during the interviews. Another and not anticipated effect was that I discovered some cross-participation (I met one of the bridge players at the Senior University lecture, and another one at the Tuesday Club).

In the third stage, I asked the responsible person to arrange a meeting with at least three and at most eight persons who were, or had been, involved in running the activity, including at least one of each sex. These criteria were met. The group interviews took from 90 to 120 minutes, and included three (PHG and QH), four (SU) and five (TC) persons. Setting up the interviews turned out to be quite time-consuming. Many of the persons to be interviewed were busy most of the week, and finding a time suitable for all was hard.

Description of the four cases

This section contains a brief description of the four chosen activities, based on the interviews, the participant observation and secondary sources (information found on their websites, or in documents provided by the responsible persons).

| Activity | Started | ≈ Members | ≈ Participants pr week |
|----------------------------------|---------|-----------|------------------------|
| Senior University (SU) | 1997 | 500 | 350 |
| Pensioners hiking group (PHG) | 1985 | 300 | 150 |
| Queen of Hearts Bridge Club (QH) | 1998 | 25 | 20 |
| Tuesday Club (TC) | 1999 | 70 | 45 |

The Senior University

When I arrive 15 minutes early at the venue for today's lecture, about 250 elderly are already seated. The hall takes more than 400, and when the lecture starts it is almost full. The leader introduces today's lecturer, who speaks for 70 minutes, divided in two by a short break. In the end, the floor is open for questions or comments, and five individuals in the audience raise their voices. The Bergen branch of the Pensioners University (which early on changed its name to the Senior University) started in 1997, and immediately became very popular. At the start of every semester, there has been a long line of elderly trying to secure one of the 500 entry cards. The program shows that the themes vary greatly. This particular semester, the 13 lectures cover issues such as birds of passage, security policy after cold war, Jesus, specific women artists, language technology, and - the lecture which I attended - 'the significance of spinsters 1870-1940'.

The Pensioners Hiking Group

A Wednesday morning in March, 45 elderly and myself gather at the end of one of the valleys around Bergen (usually there are about 70 participants, I'm told, but on this particular day there is a parallel hike for cross-country skiers). The leader, who I've only spoken to on the phone, greets me and introduces me to the rest of the group as a university researcher who studies 'old folks' (general laughter). After some practical information from the tour leaders on today's hike, the crowd starts to walk into the valley. The hike takes about 4 ½ hours, including half an hour's lunch and a couple of shorter breaks. We walk about 10 kilometres and 250 height-meters, which, I'm told, is quite the average. There are two tour leaders, who walk in the front and the back, have radio contact and are responsible that no one gets lost. If someone cannot complete the hike, they're accompanied to the nearest road, or, more rarely, some means of transport has to be provided (at this particular day, all participants completed the hike, apparently without any problems). During breaks, one of the tour leaders gave small talks about places along the route. The PHG has existed since 1984, when it was started as a specialised group within the Bergen Hiking Association. The activity for pensioners is divided into three, based on how strenuous they are. The most fit gather on Mondays, for a longer and brisker walk than the one I followed, whereas there is a parallel group on Wednesdays for those less fit (this group takes a cable-car up on the mountain, and does some easier hiking). The hikes take place all year, regardless of weather. Once a year, a week-long trip to another part of Norway is arranged. This seems to be a big social event, and last year about 120 attended.

The Queen of Hearts Bridge Club

Five tables, with four persons seated around each, fill most of the mingling floor space in the local city council's cultural office. I notice, somewhat surprised because of the club's name, that more than half of the players are men. All have arrived in time, and the play begins exactly according to the schedule. Each pair will play a total of 18 games, two against each of the nine other pairs, which all together takes about four hours. In the end, points are counted and winners pronounced. The play is only interrupted by short breaks, when tea, coffee, cookies and small, home-made sandwiches are consumed. There is not much talking, except for commenting on the last game. Some of the players also make an effort to explain bidding and rules to me. The club started in 1998, with two tables (eight players). The activity takes place every week, and once every year the club goes away for a weekend, to play and to socialise. The name was suggested by one of the gentlemen members, who said that he thought that Queen of Hearts was fitting because of all the beautiful ladies in the club.

The Tuesday Club

In the communal room of a large housing cooperative, about 40 elderly are seated around a long, T-shaped table. I'm invited to sit down at the top end, beside the leader, who's got a microphone. The event starts with the same song as always, I'm told; 'Let us live for each other', after which the leader welcomes everybody and me especially. Coffee and cake is served, and then there's a lottery: Everyone has brought one small, paper-wrapped gift, and these are distributed to those whose numbers match those pulled out of a box. After the lottery there's more singing, and then a work-out session where everyone but a few take part. Finally, one of the women reads local stories from just after WW2, to general amusement. The arrangement finishes by a farewell song, after about 2 ½ hours.

Results and discussion

The following sections summarize the main themes and results from the focus group interviews.

Objectives and motives

Not surprisingly, the social dimension was stressed during all four interviews, in response to my questions concerning purpose of the activity and reasons for participation. Several interviewees pointed out that a potential danger of growing old is loneliness, and that an important function of the activity they take part in organizing is to be a meeting place.

The PHG interviewees also mentioned three other motives: To prevent physical decay and diseases, to experience nature, and go to new places (not just walk the same old hikes over and over again). The alternative to taking part in such outdoors activities was constructed as becoming one of those inert old people, usually men, sitting inside all day with their remote control and beer bottle. The hikers stressed the health benefits of frequent walking, and said that the inert elderly probably wouldn't live long.

Three of the activities can be seen partly as a continuation of existing leisure activities, but where the general activity for all groups became less attractive than before. The PHG grew out of an existing hiking group, where some participants felt that they were getting to old for the main hikes. One of the TC organizers, who'd been singing in a choir for years, felt that he was becoming old compared to the others in the choir, and that the selection of songs didn't appeal as much to him as before (too much modern stuff). Most of the QH participants had played bridge before, but now had time to play every week (and during the day). This last point seems to be an important common denominator for all the activities, and one of the main reasons they're addressed especially at this age group: That they take place on weekdays, during standard working hours.

Membership and recruitment

Except from the QH bridge club, who's highly dependent on an exact and stable number of (competent) players, the organisers saw no particular need for active recruitment, beyond the 'spread the word' method among its members. The SU from the very first meeting had to deal with more interested attendants than their locality could fit in.

Gender is an interesting dimension when it comes to self-oriented voluntary activities among the elderly. At the QH, less than half of the players were women. When I took part in the PHG trip, about half of the participants were women, but I was later told that they make up about 70% of the group. At the other two activities, SU and TC, about 80% were women (my own observations were in line with the interviewees own figures). Imbalance was mostly explained as result of demography. Among the organizers, there seems to be more balance, and even an overweight of men - which is hardly surprising in this age group. Three out of four initiators were men, and three out of four current leaders are men. In focus group interviews, 8 out of a total of 15 were men. In the PHG, three out of four tour leaders were men. During the question round after the lecture at the SU, the three first out of the five questions in total were asked by men - even though men only made out one of five listeners. And these were elaborate comments more than questions, very different from the last two specific questions asked by women. This was even more striking since the issue was spinsters.

Organization

Not much to say about organisational structure; they all seem very formal on this. They all have an elected (executive) committee with approximately monthly meetings, written rules, and an annual meeting for all participants. The PHG has a particular rule of maximum four years on the committee - in order to stimulate new initiatives.

Budgets are low, and they all try to keep expenses down, which they see as important for participation: It is repeatedly stated that many elderly don't have that much money. In fact it is striking to me how money is talked about - expenses that seem minor are talked about as obstacles and internal nodes of conflict. For instance, whether the players should be paying 10 or 20 NOK (€1.25 or €2.50) for entrance each time, has been a contested issue within the QH. An initial 'investment' of NOK 100 each (about €12), for bridge card boxes, was also an important issue. Sobriety seems to be the key word for all the activities.

Independence also seems to be important for the organisers of all four activities: 'We manage on our own' is a representative phrase when they are asked whether they would have liked more support. The SU started up independently, and chose not to enter any of several efforts to create a national network of senior universities. Independence is seen as important to avoid too much bureaucracy, and to be able to do what one wants. For instance, the TC started as a split-off from an existing club, run by three local congregations. According to the interviewees, some of them were irritated because they were not allowed to hold lotteries, and neither to spend collected money in any way they wanted (i.e. to go on excursions).

On the other hand, there are mixes of the voluntary and the public. For instance, there have been three new branches of the SU in suburban outskirts of the city, and in all three cases they have started in cooperation between the local cultural offices. The QH started after the local cultural office posted a request about interest in bridge, and the club has since its start played in venues provided (for free) by the local city administration.

A general opinion among the interviewees, when asked about public responsibility for active age, is that there should be a mix of public and private. This seems to be in line with dominant Norwegian culture, with its strong tradition of public/private mix. One area is different, though, and that is health care, which the persons interviewed talk about as an undisputed responsibility of government. This is a responsibility that the state fails to live up to, is the expressed opinion of many of them.

Other and crosscutting activities

There seems to be enough activities to choose from, both from public authorities and from voluntary organizations - at least for those in good mental and physical shape. The standing joke among today's pensioners is, according to one of the interviewees, that 'before, at least we had Saturday off'. And this is the general impression I get. On the other hand, the participants in these activities, and not least the organisers, are probably not representative of the total group of elderly in the Bergen area (about 30.000). They are likely to have more resources, and to be in better physical and mental shape than the average.

It was stressed that choosing to be active is easy, as long as one is physically and mentally fit. The real challenges, and maybe even possibility limits, for active ageing policies, might be located in the large group that doesn't.

The SU focus group explicitly mentions the PHG, which already had activities on the same day of the week. Several participants at the SU had argued that it should take place on a different day. Many of the participants go to different activities on different days.

Vocabulary

The Senior University early changed its name from Pensioners University, according to one of the interviewees due to an existing educational activity using the 'pensioner' word. Thus the immediate reason seems to have been practical. Afterwards, however, the committee got good feedback on the senior word. Senior is more extensive, goes down to 55 years. There is some potential for confusion, since it is used in work life politics about workers above 45. There are different opinions among the interviewees about vocabulary, although most of them want to avoid the word 'old' (one interviewee say that a spade should be called a spade, and that 'old' is fine). 'Elderly' seems to be the preferred expression everywhere, with 'senior' up and coming.

Important for success

What can be learnt from these initiatives? When asked about this, one answer was continuity - that someone is able to make sure that the activity takes place when it is said that it will take place, and that it will continue for some time even if the initial response is low. This was especially stressed in the PHG, but also in the QH.

Another factor seems to be low entrance fee. A theme in all four group interviews was to avoid having to charge participants too much. In the SU, lecturers were not paid, in order to keep costs down. The PHG said that they preferred to charge a little extra for popular arrangements, like excursions, to subsidize the activity itself. In the QH, there was as noted earlier disagreement about whether entrance ticket each week should be NOK 10 or 20 (this also included coffee, tea and some light food). The TC deliberately charged only NOK 10 for entrance, and made a surplus on a monthly lottery instead.

A third mentioned factor was change in leadership. The PHG had a formal rule about a maximum of four years on the committee, but change in leadership was also taken up in the other group interviews as positive.

Except from PHG, whose activities take part outdoors, an important issue was location. The SU has its lectures in a theatre, which they rent. The capacity of this seems to restrain participation, and the committee has discussed alternative and bigger venues. The QH has been helped by the local culture office, and dispose their current venue for free. Next year, they will have to move, and finding a place to be seems to be an important committee task. The TC has found a location by themselves which is sponsored by the house building cooperative which owns it.

Senior politics in general

When asked about the main problem with getting old in Norway, there is a strong common denominator among the interviewees: Not to be able to care for oneself. The main task of public services is seen to be to provide sufficient help for those who need it, those who cannot manage on their own (mentally or physically). Several interviewees feels that the elderly are not a political priority; 'We're out of date'. There's also a general feeling that Norwegian senior politics have deteriorated, due to financial cut-backs. Several say that the demographic crisis, or 'elderly wave', is exaggerated, and that it is unfair to see the elderly, who've paid taxes all their lives, as a burden.

Conclusions and recommendations

One should be careful to make strong policy recommendations on the basis of this limited empirical study. The cases might be fairly representative of voluntary activities among the elderly, but it seems to me that the real challenges for active ageing policies is to reach those who do not show up at activities like this, or do not have the personal resources to organise activities of their own. There is obviously also a large number of elderly who do not engage in self-organised activities like these, but who must be considered to be active (doing things on their own, taking care of grandchildren, etc.). It also seems imperative to resist the temptation to think of 'the elderly' as a natural group, distinct from society at large. The framework of this package study can be said to somewhat fall prey to this temptation. In my opinion, one cannot expect the elderly to behave qualitatively differently from younger generations. Intergenerational projects therefore might be especially conducive to active ageing, since they build bridges between generations and make it possible for citizens to retain strong links between their life before and after retirement. Policies for social inclusion in general must moreover be seen as important in relation to leading an active old age. For instance, a policy that secures a stable, lasting connection to the work market, could create social networks that are crucial resources for people after having retired. On the other hand, the empirical results in this study show that authorities can offer some non-costly assistance to self-oriented voluntary activities. Economic support in the initial phase of a project may be stimulating, since money is an important issue for those involved (when the activity is up and going, this seems to be required, since expenses are kept low through the attitude of sobriety). Providing localities to those who need it, is another form of assistance than could make it easier to create and run voluntary projects.

Comparison with the Czech Republic (this paragraph was written later in knowledge of Chapt. 4.2)

Not surprisingly, there are some differences between the two countries. Most significantly, activities for the elderly seem to be more immersed in established organisations in the Czech Republic than in Norway. According to the Czech report, all the activities under study "are conducted under the auspices of a formal organization". This is in contrast to the activities studied in Norway, of which three out of four were initiated from below, independently of any formal organisation. The last one (the Pensioners Hiking Group) was also initiated from below by elderly themselves, but from within the 'mother organisation' (the Bergen Hiking Association) to which it has formal administrative links. Another notable difference is the demographic profile of the older people organising the activities. In the Czech Republic, they are significantly younger than in Norway (around 55-60 compared to in their mid-70s), and women seem to be somewhat more over-represented in the Czech Republic than in Norway. Whether this last difference reflects gender differences in activity among the elderly, or is related to the selection of studied activities (the Czech ones being more care-oriented), is something that should be looked more into.

Just as striking as these differences, however, are the similarities between the Norwegian and Czech cases. First of all, the elderly persons' expressed objectives and motives for engaging in the studied activities are very similar. In both countries, the social dimension seems to be of primary importance: The activities are spoken of as *meeting places*, and one of the expressed motivations for taking part in them is to avoid loneliness. The elderly thus seem to actively reflect around and engage with the social dangers of leaving work life and of getting old, including the potential or actual loss of colleagues, friends, and partners. Just as important as, or maybe even more important than, the activity type itself, are the social functions of the activity: It binds people together and reduces the feeling of loneliness.

In both countries, the interviewees seem self-confident and certain that they can still achieve things: They do not at all conform to the stereotypes of the elderly as weak, as not coping, or as a burden to society. This is not surprising, given the selection of elderly in the study, which must be considered to be disproportionately more resourceful (regarding personal physical and mental health, but probably also regarding social networks and skills) than the elderly population as a whole. Moreover, the Czech team reports that the majority of older people they met were engaged in other activities than the studied ones, and also that many elderly "find full self-realisation in activities that are completely outside the reach of non-profit organizations and their programmes". This last point is also valid for Norway, and something that one should acknowledge and keep in mind when active ageing initiatives 'from above' are made.

A final similarity between the two countries is that older people in both countries consider the state to be primary responsible for health care. In other words, despite important differences in existing welfare state provisions, older people in the two countries think that society at large should take responsibility for those who are not able to cope by themselves anymore. Self-organised activities are ascribed important social functions, but not seen as fit to carry society's heavier care burdens.

4.2 Self-oriented voluntary activities in Czech Republic

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Introduction

This report presents the results of a WP5 study dealing with older people's self-oriented voluntary activities. The institutions that are involved in this type of voluntary work in the Czech Republic are mainly non-profit ones, they represent a relatively recent phenomenon and are closely linked with efforts at transforming Czech society into a civil society. This situation has certain implications, thus in the introductory part we briefly outline some of the basic characteristics of Czech civil society, the non-profit sector and voluntarism.

Civil society in the Czech Republic

We understand civil society as the sphere available for free association, for self-organisation of people who are autonomous of the state (Pithart, 2000). It is an important fact that the state enables the autonomy of the spontaneously forming organizations and actually it even delegates part of its responsibilities to some of them. In the Czech Republic the case of the civil society became somewhat politicized following 1989. However, the roots of the civil society reach far ahead of 1989. We can look at the existence of the Czech Republic between WWI and WWII (from 1918 - the founding of the Czech Republic to 1939 - the creation of the Protectorate of Bohemia and Moravia). At the time the society was very supportive of the existence of a variety of societies and organizations. Various foundations were supported by churches, secular societies as well as numerous charitable brotherhoods. Their work concentrated above all on prevention and social issues, typical examples include organizations that supported the poor and the ailing. However, professional or hobby associations were not exceptional either and they were also active in publishing a variety of output. Media - as a source of information and a means of communication - have always provided a supportive mechanism to civil society. During the World Wars, however, the activities of these organizations were understandably restricted and it was mainly humanitarian organizations that remained active. Under the totalitarian communist regime these organizations almost disappeared as none of the basic characteristics of civil society could develop. Some basic civil rights were suppressed and the same applied to any variety and variability, individual autonomy was also curbed and there was no potential for spontaneous action. The large majority of associations which existed within this system were centrally managed aggregates of people with a similar "label" rather than groups of citizens with similar interests (e.g. Gardeners' Association, Women's Association etc.). The events of November 1989 can to a certain degree be considered a manifestation of the freshly awakened civil society in the sense of a social space and a desire to implement basic human rights and freedoms. It is though necessary to remember that November 1989 saw the Czech society split into a myriad of private interests¹ (Pithart, 2000).

At the moment thus the Czech society is undergoing a transformation into a civil society. The political scientist Andrew Arato stresses the fact that the introduction of a plural system of political parties and liberal economy in Eastern Europe led to the reduction of civil society to an economic society (in Fibich, 1996, p. 281). This fact must be borne in mind. At the moment economic relationships and related personal relationships prevent the development of personal trust and primary relationships in the society. Yet these are further necessary preconditions for the development of a well functioning civil society. In relation to civil society the Czech state must solve another problem: it has to overcome its own unwillingness to share power. The Czech political representation is reluctant to transfer part of its responsibilities to the spontaneously organised citizens and to create the legislative basis for this. Yet it is necessary to fill the space between the citizen and the state, in a better case it will be civic organizations that will do this, in a worse one political parties (Pithart, 2000).

¹ In post-communist countries there is a notion that usurping part of the shared property particularly at the beginning of the transformation and thus ensuring one's wealth provided an opportunity to gain a position independent of the society.

The non-profit sector in the Czech Republic

The development of the non-profit sector following 1989 was significantly neglected in comparison with the private and state sectors and that both in terms of creating legislative conditions of its existence and also in terms of practical support from the state. Although the state administration financially supports the non-profit sector (in 2002 the sum was 5.9 billion CZK)¹, it still does not approach it as an integral part of civil society. This understanding is influenced by the unwillingness to allow the non-profit sector to influence public issues.

The current legislation relating to the non-profit sector is unsatisfactory. Civil associations which are the most frequent form of non-profit organizations comply with the too general Law on the Association of Citizens of 1990 which does not sufficiently regulate their activities. The unclear formulations of this law as well as of others cause a number of misunderstandings. At the moment there are 58,452 civil associations registered in the Czech Republic.² Different statistics³ claim the number is 52,600. The difference can be accounted to the varied character of associations - some are inactive, not all of them are officially registered etc. The Ministry of the Interior keeps the official statistics, unfortunately, on its basis we were unable to identify the exact number of associations that are devoted to older people or to their voluntary activities. In the Czech Republic there is a large number of associations of house and flat owners, professional organizations, associations related to sports, horticulture and animal rearing etc. However, we do not have at our disposal any way of systematizing them.

Non-profit organizations (NPOs) are most often involved in providing housing for poorer citizens, the development of social services and services linked with new forms of care (e.g. services for marginalized groups, the homeless, drug addicts, personal assistance etc.). Recently, as the society becomes more aware of the consequences of population ageing, non-profit organizations also increasingly target the elderly. The provision of health care and education remains the domain of the state yet gradually non-state health care and educational institutions appear. These are mainly privately owned - thus they do not involve non-profit organizations.

In April 2004 STEM agency carried out a representative survey in the CR entitled "Civil society". The survey was a follow-up to similar research carried out in 2000. It became clear that during the last four years the public became more appreciative of non-profit organizations.⁴ Approximately half of the respondents think that non-profit organizations are influential organizations that help solve social problems (48%). The large majority (80%) is convinced that NPOs help generate compassion in the society and only a somewhat smaller share of people (70%) consider work in voluntary NPOs worthwhile.

The public perception of NPOs is not unified though. We can basically distinguish three images of NPOs - charitable, participatory and negative.⁵ For 34% of the population NPOs have a participatory image. This is a group of people who value NPOs above all for their political role in the society, i.e. the ability to represent citizens' true interests and enable them to participate in the handling of public affairs. Those respondents (ca 17%) who associate NPOs with a negative image do not see the usefulness of such organizations for society or they understand them only in terms of providing space for ambitious and dishonest individuals (see Figure 2).⁶ The third group of respondents (ca 49%) is made up of those who attribute a charitable image to NPOs. They view NPOs above all as charitable and service institutions.

1 Source: CSO

2 Source: Ministry of the Interior (www.mvcr.cz).

3 The Non-Profit Organizations Information Centre (www.neziskovsky.cz)

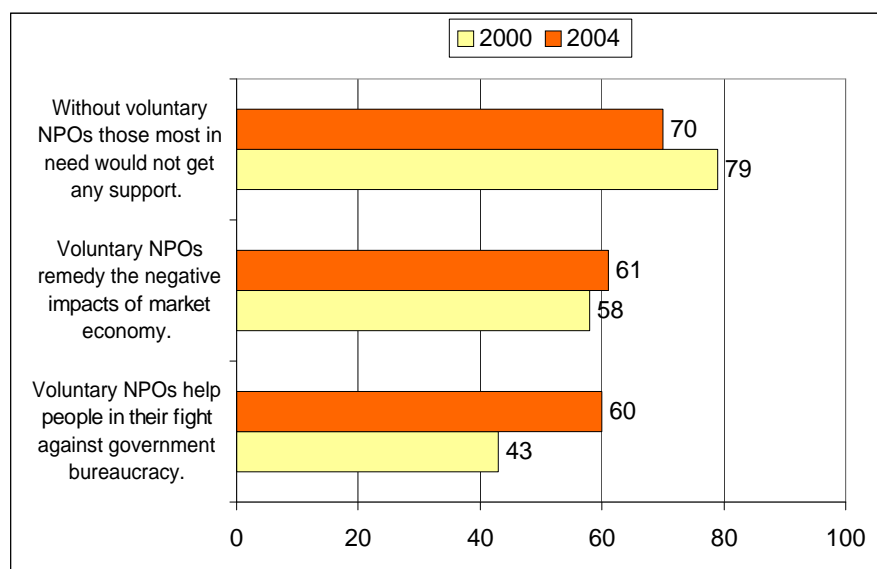
4 When NROS together with AGNES conducted a survey on patronage and voluntarism in the CR in 2000 it found that 30% of respondents did not know – and had not even heard of – a non-profit organization. This finding, however, has more to do with the fact that a large portion of the inhabitants did not actually know what a non-profit organization was.

5 Findings of NROS and Agnes in 2000 (www.agnes.cz).

6 For members of this group NPOs have a markedly negative image and that both in terms of their participatory as well as service functions. The large majority of them (82%) do not consider the services provided by non-profit organizations to be of high quality and thus they do not want the state to support them. It is typical that this group is dominated by people who do not trust others (74%), they trust political parties rather than NPOs (52%) and are not interested in influencing public affairs (82%). [Frič:2001]

The positive image of NPOs is related to two basic characteristics. The first captures charity and services which they provide to those in need (70% of people think that without voluntary NPOs those most in need would get no support from anyone). The second characteristic relates to the opinion that NPOs make up the needed antipode to the bureaucracy of state institutions and the market economy. It appears that above all the second characteristic is becoming ever more important in the society.

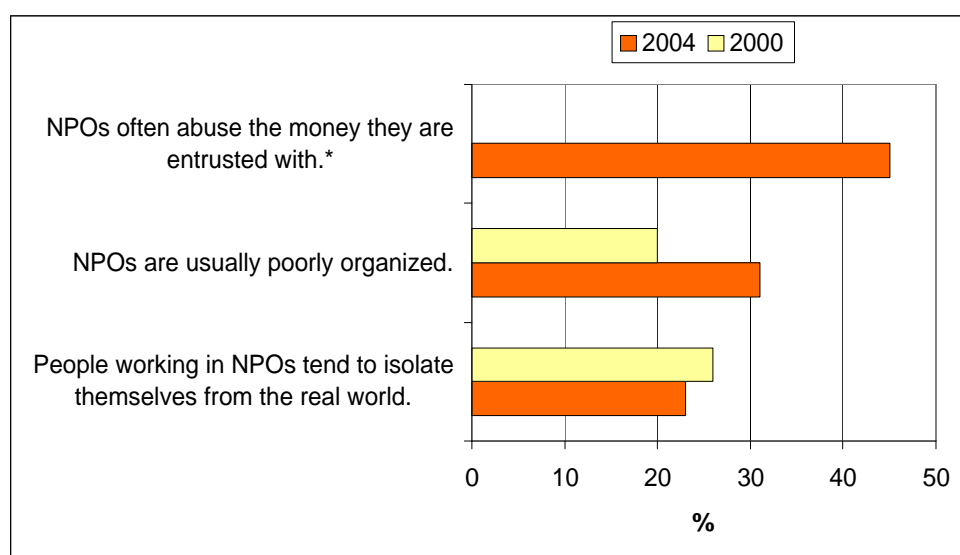
Figure 1: Positive characteristics in the image of NPOs (the share of responses “I agree” and “I certainly agree”) in %.



Source: STEM, Civil society 2004, 1018 respondents.

In contrast, we find two dominant views in respect of negative elements that damage NPOs' image - NPOs often abuse the finances entrusted with them (45%) and they are frequently founded because of personal ambition (40%).

Figure 2: Negative elements in the image of voluntary organizations (the share of responses “I certainly agree” and “I rather agree” in %).



Source: STEM, Civil society 2004, 1018 respondents (*in 2000 a question of this wording was not posed)

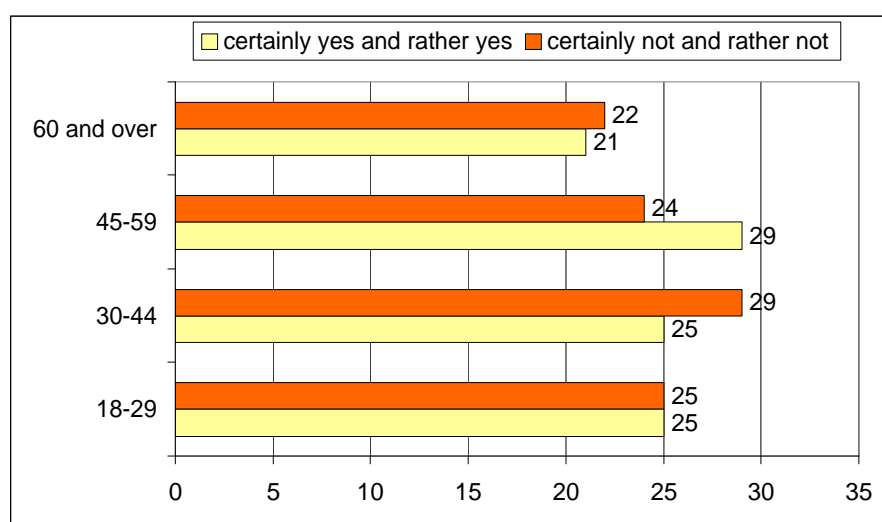
Voluntarism in the Czech Republic

Following 1989 a variety of new activities and associations that were based on personal enthusiasm and voluntary work came into being. This involvement stemmed from the willingness of some citizens to freely commit themselves - to others or to change in the society – according to their convictions. That, however, was not easy. Following decades during which everyone was mainly concerned with his/her life, citizens (above all the younger generations) are only gradually becoming interested in other lifestyles. To help others became a possible form of self-realisation (apart from a profession itself).

So far voluntarism has not been incorporated into any legislation in the Czech Republic which explains how difficult it is for everyone - and in particular the state - to introduce an acceptable and clear definition of voluntarism, types and characteristics of voluntary activities and volunteers' rights and responsibilities. As Tošner (2001) points out "this state of affairs is reflected in a number of organizations where there are many volunteers working yet their work is haphazard and the most valuable asset - the volunteer's motivation - may quickly be exhausted when the first organizational and communication problems occur."

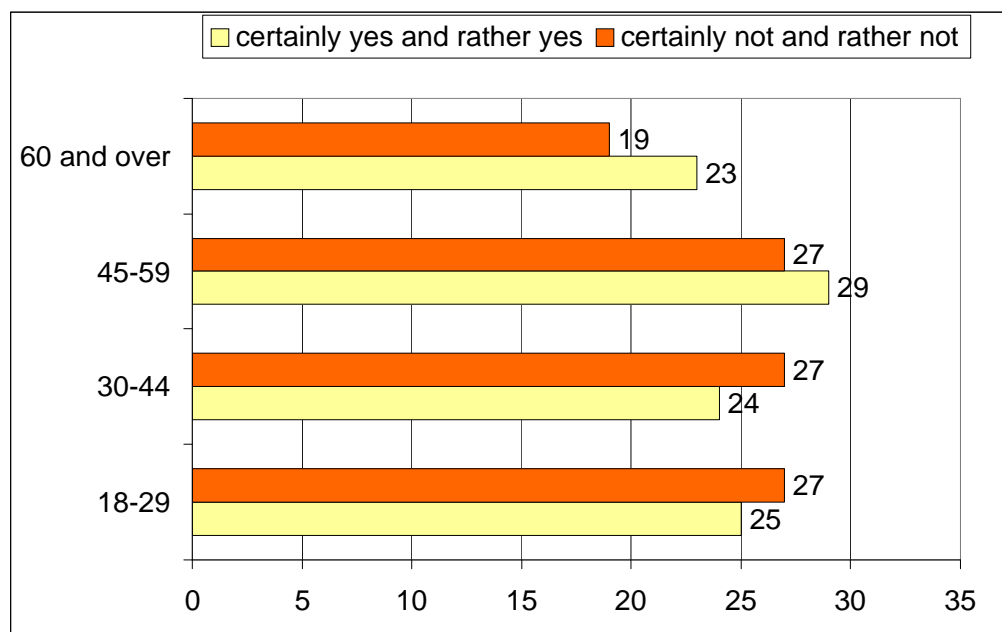
There are a number of motives for voluntary work. From Frič's research (2001) it becomes clear that in the Czech Republic voluntary work mainly involves the feeling of doing something worthwhile (95%), the possibility to increase and widen professional skills and a suitable way of spending free time (77%). The majority of volunteers stated that voluntary work increased their self-confidence (77%) and enabled them to stay fit and not to lose work habits (63%). Research conducted in other countries suggests that volunteers think "volunteering" is highly valued in their society. This, however, does not apply in the case of Czech volunteers. Less than half of the respondents-volunteers (45%) think that their voluntary work also brings with it social approval. The results of the survey "Civil society" also show that while in 2000 only 16 % of inhabitants did voluntary work, in 2004 it was already 32%. In fact as many as 52% of respondents stated that were they asked they would gladly become volunteers. Nonetheless, there are no significant changes in attitudes to volunteering. Two thirds of the respondents (67%) repeatedly think that if the state fulfilled all its obligations volunteers would not be needed. Three quarters of citizens also share the view that volunteers cannot solve the problems of towns and cities, these should be solved by the state administration. This distrust involves volunteers per se as, on the contrary, trust in non-profit organisations is on the increase. A large section of the public (65 %) is aware that voluntary organizations participate in public life - both by their services as well as by charitable work - and that they protect the true interests of the citizens. It is important that people who acknowledge the importance of the social roles played by NPOs are at the same time largely (62 % of them) convinced that NPOs also represent their interests. The figures below show respondents' views by age. The findings show that the younger respondents were more sceptical in respect of the possibilities that NPOs have for intervention than respondents aged 45 and over.

Figure 3: Do you think that in the CR voluntary organizations can represent the true interests of citizens? (share of respondents by age groups).



Source: Civil society 2004, STEM and NROS, special question

Figure 4: Do you think that some of them succeed in representing your interests? (share of respondents by age).



Source: Civil society 2004, STEM and NROS, special question.

The finding that compared to political parties citizens view non-profit organizations as significantly more trustworthy is also very interesting – 75% of respondents (Frič, 2001) expressed more trust in non-profit organizations than in political parties.

Voluntarism is one of the few areas in which older people can actively participate. They can participate in work in a variety of areas: ecology, humanitarian aid, social and health care, education as well as culture.

It is becoming clear that people of retirement age are in comparison with other age groups more active in political parties (17%, of those 10% regularly and 7% sometimes) and in local government (17%, of those 4% regularly and 13% sometimes). They do not differ from the average in the sample in respect of work in civil associations, charities, cultural associations and foundations. A lower share of involvement was found in the case of professional organizations (13%, of those 4% regularly and 9% sometimes), clubs and societies (24%, of those 6% regularly and 18% sometimes) and in sports organizations (17%, of those 5% regularly and 12% sometimes) ("Aktivita...", 1997).

It became clear that voluntary work had a clearly positive influence on older people. Some studies from the late 1990s show that volunteering improves older people's physical health and mental well-being as well as self-confidence, life satisfaction, approach to support systems and levels of activity (among many others Van Willigen, 2000)¹.

¹ Van Willigen attempted to test these hypotheses in more detailed research. Van Willigen found no differences between genders in terms of types of voluntarism or time devoted to it. She also found that voluntarism involved people without serious physical disabilities, they were more often married, had higher education and higher family income, felt economically less restricted than the rest of the population, they were more integrated in families and among friends, were more religious and came from areas with dense social backgrounds. People who have children also volunteer more frequently than those without children.

The elderly to the elderly (the self-oriented principle)

Following an introductory overview of the general situation in the non-profit sector in the Czech Republic we consider the concrete case of older people who are themselves actively engaged in providing services (respectively education, free time activities etc.) to other older people (self-oriented activities). The aim of interviews we conducted with representatives of various organizations in the non-profit sector was to map the possibilities of and problems with activating the elderly in the Czech Republic and to explain certain specific features of the post-socialist environment that could help explain the differences among the CR, Norway and France.

For the purposes of our research we selected the following five non-profit organizations which provide at least some activities for older people. Another selection criterion was that older people could also participate in these activities as volunteers. These organizations were divided into five groups according to the type of services provided:

- Health care - self-help type (Regional Charity Strakonice)
- Health care - help to older people (INKANO)
- Culture and arts (Remedium - theatre company PROMĚNA)
- Life-long education and modern technologies (Život90 - Senior Academy)
- Voluntary work for the community (The Czech Union of Pensioners)

Methodology and data

Due to the fact that it was impossible to include and map all the types of organizations which target the elderly and at the same time apply the self-oriented principle we selected three organizations from large cities (Prague and Brno) and two organizations from smaller towns (Písek and Strakonice).

We gained basic information about their services and running from their web pages. We used e-mail contact to check whether they actually provided the types of activities that we were interested in and following that we asked the organization to co-operate with us. In the end we arranged meetings with the managers of the given activities.

Participant observation provided another way in which we gained information about elderly volunteers. If it was possible we at least once attended a meeting or a session in which elderly volunteers participated. Participant observation led us to the finding that some older people are actively engaged in more organizations (a lady who was involved in senior theatre in Remedium also sang in a choir in Život 90).

The interview itself was conducted in the last phase. On average three to four people participated. Unfortunately we were unable to ensure the equal representation of men and women. Our research showed that in the CR it is above all women who work as elderly volunteers. It was also something of a problem to find a suitable time for an interview as many pensioners were very busy and it was difficult to make an arrangement.

Description of the selected individual organizations¹

REGIONAL CHARITY STRAKONICE: Volunteers (ca 20) play a role in the work of the charity, half of them are older people who mainly act as companions to those living in elderly care homes, they go for walks with the clients-older people etc. Volunteers are also involved in personal help in individual households – assistance with hygiene, eating, petty chores, help with shopping etc. We accompanied an elderly volunteer (former nurse) on her visit to a lady whose ability to move was restricted (one of the clients of the Charity). Volunteer work included tasks that are normally expected from caregivers, had they not been provided by a volunteer the client would have had to pay for them. A major part of the visit was social bonding (sharing thoughts on a walk).

INKANO: Here older people actively participate as volunteers in two projects “Volunteers in hospitals” and “Volunteers for older people”. The engagement of older people in these projects was preceded by a successful pilot project Active Ageing. Within the framework of these projects volunteers visit ill people or inhabitants of pensioners’ homes, talk to them, go for a walk etc. (thus it is again mainly social bonding that is involved). They often make friends with their “clients”, help them pass time. In INKANO elderly volunteers are considered to be the best, they are of the same generation as the “client” and they are reliable. I visited a pensioners’ home with one of the volunteers (an elderly woman). At 10:30 a.m. an ambulance picked us up at the hospital in Písek and it drove us back at 2 p.m. During her stay the volunteer visited four “clients”, they spent the time talking, walking and the volunteer also read books.

REMEDIUM: Remedium does not have an independent volunteer centre yet volunteers help significantly (altogether there are about 20 of them). Older people also work in Remedium as volunteers, they participate in a variety of programmes, sometimes they manage their own activities e.g. talks or walks in the countryside and they often help with organizing. One of the relatively new activities is senior theatre. In 2003 within the framework of Remedium the theatre company PROMĚNA was established. In this case the elderly played a great role as they initiated it: (*... „there was a meeting once a month ...and there we agreed that we could found a society - poetry readings or drama...first it looked as though nothing will come out of it but at the beginning of September we did really get together ...in the end we prepared poetry readings...that is how it began...then the first play was rehearsed...the television did a report about it...”*) The theatre company has been active for over a year and during its existence it gave a number of performances not only to the families of the involved but also in a number of pensioners’ homes. The company has about 12 permanent members. Actors-older people meet every Wednesday for 2 to 3 hours. To get to know the situation better we attended a rehearsal. The company began to rehearse a new play, i.e. roles were assigned, the play was read for the first time etc. One of the merry moments occurred when the actors learnt that one of the characters was 45 years old and they all wanted to play him. They also all actively participated in making decisions about the shape of the future play.

ŽIVOT 90/LIFE 90: In Život 90 elderly volunteers work above all as lecturers within the Senior Academy which is involved in education, societies and clubs, physical activities, reminiscing, therapy, culture, fashion shows and meetings for the elderly. The second main activity that older people participate in are so-called amicable visits. People who feel very lonely often call the “Senior telephone” help line, they are then frequently put in touch with a volunteer who meets such a client once or more times a week, accompanies him/her to the doctor etc. We attended an English class for beginners taught by a retired secondary school English teacher. The maximum number of participants in the course is 13. The course was full and all the participants were women who – apart from a few exceptions – retired only recently. It was amusing to see how the ladies helped each other out and the teacher tried to establish order. We found the enthusiasm with which these elderly ladies approached the study of a foreign language admirable.

THE CZECH UNION OF PENSIONERS: The Czech Union of Pensioners is a well-known institution with numerous branches all over the Czech Republic. It is a very significant and very formal organization. We include it here because it is a typical representative of activities that are aimed above all at the state administration, organization and politics as such. Unfortunately we did not manage to visit this institution.

¹ This chapter includes only basic information which is supplemented and expanded in the appendix.

Findings and discussion

Based on the interviews and participant observation we found some interesting similarities/differences among the individual activities.

Goals and motives

As could be expected, in answers to why the elderly decided to actively co-operate with organizations and participate in their activities the social dimension was prevalent. Older people understand the majority of activities as an opportunity to meet other people. Thus we found that one of the most important motives is the fear of loneliness and isolation from the surrounding world and the events in it. (*"We have fun here ...we enjoy it...we have a chat...what would we do at home...when you are alone at home...it's too sad...we have friends here...that's a great motivation to live..."*)

Due to the fact that voluntary activities involving the elderly are adjusted to the volunteers' age, vitality and health status, older people do not experience the frustrating feeling that they "can no longer cope". On the contrary, they become self-confident because they can still achieve something. We think that this is connected with the identified motive - the search for diminished self-confidence and self-esteem.

The third dominant motive we identified is the need to help, to feel useful. As will be shown further a large part of elderly volunteers are people who retired only recently. The transformation from productive age to post-productive age is generally understood as a problematic one. For a number of freshly retired people voluntary work represents a way of overcoming this period in life. Their lives gain a new order. A large part of the older people also agreed that they wanted to help other older people as long as they still had enough strength to do so.

Membership and the acquisition of new members

Let us first look at the demographic profile of elderly volunteers. In all the organizations that we researched their average age was around 55-60 years. They are thus relatively young older people who entered retirement only recently. Within the Senior Academy organized by Život 90 there are also older people among the active participants and the age group of 80+ is also represented.

Another interesting dimension is gender. According to the creators of the programmes more than 80% of the volunteers are women. In the course of participant observation we encountered only one man - an actor in the senior theatre company. In respect of the organizers themselves we always dealt with women. It is probably only at the Senior Academy where the number of male and female lecturers is the same. Men were significantly underrepresented also among the clients of individual volunteer programmes. It is difficult to identify the reason why women are more active participants in voluntary activities than men. Some programme managers thought that this was probably due to the very nature of women as they have stronger social feelings. Elderly women themselves pointed out that women were more adaptable and resourceful. Women also live longer than men. Another reason can be the thus far missing tradition of voluntarism. It is possible to think that once the society adjusts to this recently rediscovered institution also men will begin to participate more.

The majority of volunteers had secondary education the second most frequent was university education. In this respect it is, however, necessary to keep in mind that at a time when "our" older people could in principle study at a university the Czech universities were closed upon the order of the Reich Protector. This is the reason why many of the now older people have secondary education.

Neither Remedium nor Život 90 or Regional Charity actively searches for volunteers. Since the activities of these organizations are generally known volunteers often approach them. In the case of INKANO in which they are trying to widen the voluntary basis of older people the managers of the volunteer programme are more active. They attempt to address and offer co-operation to a wide spectrum of older people using media, targeted lectures etc. If a senior wants to become a volunteer in the majority of cases s/he has to fulfil only criteria that are set in the project that s/he enters into. Sometimes it is necessary to attend training sessions, sign a declaration of prior criminal conviction etc. The most important criterion, however, is the willingness to participate in an activity.

Finances

As we already mentioned older people as volunteers enter into projects that are created by individual organizations and form part of their activities. Basically each such project has its own budget. It is, however, a question how the projects are financed. Each non-profit organization has its own budget which is financed from a variety of sources. Within the organization individual projects usually have their own sub-budget, which is more or less independent of the main budget. Since individual corporate sponsorship has not yet fully developed in the CR and national grant agencies are not strong enough financially, the majority of non-profit organizations rely on state subsidies. For all the organizations we mentioned it is of key importance whether the given project gets financial support from one of the ministries, most importantly the Ministry of Labour and Social Affairs, Ministry of Health, Ministry of Culture or Ministry of the Interior. Other financial sources include EU funds, various foundations, individual contributors and profits from the organizations' own activities. We think that in this respect the future should be determined mainly by the private sector, its importance in financing voluntary activities is gradually increasing. An exception is only the Czech Union of Pensioners. The organizational sections of the Union gain financial means for their activities above all from membership fees, profit from commercial activities or cultural events, gifts, loans and subsidies.

In the case of profits from an organization's own activities we mean above all membership fees, in the case of Senior Academy course fees. Membership fees and course fees range from 100 to 1000 CZK (in the case of course fees) per year. The elderly do not complain about the amount of the fees.

Creators of the programmes as well as the elderly involved in them consider it important that these services for the elderly are independent of the state. According to them older people themselves should attempt to actively approach their old age and be involved in the society. The government should, however, create the conditions and sufficient space for the involvement of the elderly in an active life. This view differs, for example, from the one on who should look after old people's health as in respect of health care the elderly prefer the significant prevalence and dominance of the state sector.

The promotion of voluntary activities is also considered very important. Older people believe that the small number of elderly volunteers is the result of insufficient information about the possibilities of working as a volunteer.

Other activities of elderly volunteers

The majority of older people whom we met were involved in more than one activity. For example, a lady played theatre in Remedium, in Život 90 she was very active in the choir and thanks to the local pensioners' club she danced the evenings away in dancing classes for the elderly. We often encountered the following view: "If I did not want to do this, I would do something different." We could not doubt the eagerness of the already active older people to participate in almost any activity. In their case it was not even necessary to motivate them in any particular way. However, when we asked how to motivate those who are not yet motivated, no one, including the project managers, could give us an answer.

It must also be taken into account that many older people find full self-realisation in activities that are completely outside the reach of non-profit organizations and their programmes. We think of help with raising grandchildren, gardening or spending time at and around the cottage ("cottaging"). It is mainly the last activity that is among the most popular among Czech older people. The Czech "cottaging" as such has no equivalent in other countries in terms of its popularity and scope. Older people often busy themselves with these activities full time.

The organizations make an effort to become more known and spread information about their activities. They use a variety of media - local newspapers, radio, sometimes cable television etc. The majority of them also publish their own magazines (Zpravodaj seniorů - Senior Newsletter, Generace - Generation, Charitářek - Charity Newsletter etc.). Nonetheless, we did not get an answer to the question on how to motivate the indifferent.

Social policy related to older people

According to those who prepare programmes of voluntary activities for the elderly and are involved in issues affecting them the problem of Czech social policy relating to the elderly lies in turning a blind eye to specialists. They complain that a range of laws and other stipulations are the work of the bureaucratic apparatus and do not at all reflect the real needs and problems that people encounter in praxis. A more flexible and less bureaucratic apparatus would significantly help the implementation of various programmes of social help. We also found notions on the retirement age limit interesting. All the involved, i.e. not only the older people but also creators of activating projects, agreed that to solve the problems connected with the ageing of the Czech population by changing the retirement age limit is not a very fortunate solution. Many people look forward to retirement as they plan to do repair work on and around their cottages or to visit Paris but the delay of entry into retirement presents a real threat that they will not have enough strength for any of these activities. According to interviewees one has the right to active retirement after so many years of productive work and payment of taxes.

Conclusion

The Czech population ages relatively fast (according to the Czech Statistical Office the fertility rate in the CR in 2003 reached the value of 1.18). This situation results in a number of problems which the state and its representatives attempt to tackle. The reform of the pension system has been undergoing preparation, retirement age was postponed and the state and its representative bodies support the construction of new pensioners' homes (they concentrate above all on pensioners' basic needs such as housing, food, adequate health care etc.). The older people themselves noticed a number of changes in this respect. The problem, however, becomes clear when we look at older people's free time activities. The most pressing problem with all the activating projects is to ensure sufficient financial sources for their running. Due to the fact that it is necessary to apply for finances annually, it is not at all certain that a project will continue the following year. In the case of managers of activating projects we often encountered the notion that offices, grant committees etc. do not take this type of projects too seriously. The aspect of voluntarism is understood in a similar vein. In relation to voluntarism, the elderly are still understood more as passive recipients rather than active volunteers who could help other older people. And this is also the way in which the question is handled in contemporary literature. It is, however, desirable that older people began participating in voluntary activities.

The gravest problem that in many respects currently prevents the development of many activating projects is a stereotypical – a prejudiced – attitude towards older people that the Czech society had not so far changed and settled. None of the elderly interviewees complained about the material conditions of their lives. They, however, dissented the image that is shared by the majority of the Czech population that an old person is useless, inactive and that "old equals silly". According to them this stereotype is to be blamed for restricting the scope and number of activities for the elderly. It can be expected that the resentment linked with activating projects for seniors is based on a similar understanding of older people.

In this context let us return to the problem of changing limits of retirement age. Currently in the CR the situation is such that a large percentage of long-term unemployed is made up of people aged over 50 (see e.g. ActivAge WP2 and WP3 Czech Country Report). According to the elderly the reason lies in the myth about old people's incapability, "they are not flexible enough". In that case a question arises: why increase the retirement age if we actually prolong the period in which a large number of people who would enjoy the fruits of their life-long work actually depend on social allowances. Older people's views on this development are clear - the underlying reason is the state's attempt to save money spent on pensions as in the case of the long-term unemployed pension will be calculated from a very low base. Nonetheless, no any empirical proof that older people work worse than others (among many others Muffels, 1998) has yet been proposed. It is thus clear that the prejudice against old people should be challenged and changed. One of the possible solutions is, according to the elderly, to get older and younger people closer. For example, Život 90 is setting up the project "Find yourself a grandma/grandpa"; it welcomes their senior members' grandchildren in its premises. Mrs Lormanová thinks that older people should also be in schools and kindergartens. From a young age one should learn that even an old person has something to offer to the society.

Another important thought related to the need for long-term preparation for retirement. When retiring from the productive sphere each individual should have strategies prepared that would help him/her adapt to the new life rhythm. Within the framework of this preparation people should be extensively informed about the possibilities that will be available to them (universities of third age, voluntary activities, advisory centres for the elderly).

Barriers and opportunities

The following few points summarize the most pressing problems which activating programmes and the elderly who want to participate in them encounter and some possibilities which could improve the situation.

Older people complain about the lack of information and possibilities that are available to them in the given locality.

In the case of many programmes for the elderly there always has to be someone who informs about the setting and time of the activity and what it involves. A number of societies, e.g. older people's clubs, work on the principle of irregularity. Sometimes the club meets, sometimes it does not. Basically in many cases it is impossible to say that they would be organized in any manner. E.g. due to the appalling state of older people's clubs in Prague Život 90 came into being as a reaction to the demand of the elderly living in Prague.

The creators and managers of activating programmes often complain about the attitude of state administrators. According to them the programmes are not taken seriously which results in greater difficulties with getting financial support for their running.

The non-profit and private sectors should be linked together closer. This also involves the improved reputation of non-profit voluntary organizations.

The image of the senior in the society presents a huge problem. The elderly are understood as redundant. A change in this attitude should be reflected, among others, also in the situation of the elderly on the labour market.

Older people and young people should get closer.

We consider the idea of long-term preparation for old age retirement very inspiring, it is also linked to increasing older people's motivation to participate in voluntary activities.

Comparison with Norway

Since we have access to a brief report on the findings of this research in Norway (Stenvoll, 2004) we compare the situation in the two countries.

A difference can be seen in the link between the non-profit and private sectors. While in Norway the link is more or less traditional in the CR it is only getting established. At the moment the non-profit sector in the CR is still very strongly (mainly due to the absence of other sufficient financial sources) linked to the state sector. This should change in the future.

One of the hypotheses of this part of the research expected the frustration of the Czech elderly with the dissatisfactory economic and social conditions. It is true in general that Czech older people are not satisfied with their living conditions.¹ On the other hand, the elderly we interviewed did not voice this view. Seniors in Norway felt excluded from their country's social policy. They thought that their problems did not - due to financial cuts - have political priority. In the Czech Republic the elderly themselves acknowledge that the Czech political scene deals with ageing and the elderly and these actually belong among the government's priorities. The Czech elderly, however, feel excluded from the active participation in everyday life and they also mind the way in which older people as such are represented (unable, redundant etc.).

In contrast with the activities that the Norwegian WP5 report mentioned all the activities for the elderly that we dealt with are conducted under the auspices of a formal organization whose influence on the given activities varies. It seems that without a formal institution the Czech elderly are not yet able to organize on the basis of a shared interest. Since there are no available statistics that would support this hypothesis this is purely our limited working hypothesis. We are sure that there are exceptions, e.g. the Pensioners' Club in Maloměřice. This club was founded thanks to the involvement of a group of people who worked at the Czech Railways. When they retired they decided to continue meeting and after some time they founded the above mentioned club. Their activities mainly involve the organization of various cultural events. Apart from members' meetings that take place at the beginning of the year (mostly in February) there are also social meetings in which wives also participate as well as a number of interesting sightseeing tours and trips.

¹ In April 2004 it was above all people aged over 60, pensioners, the unemployed, workers, divorced or widowed people and supporters of the Communist Party of Bohemia and Moravia who assessed their living conditions as bad. (Source: News release Institute of Sociology, Czech Academy of Sciences).

„We meet also because we ourselves - train drivers and other colleagues from the Brno depot - should get to know each other better and have fun together. You know, in the workplace we just passed each other during the years of employment. When we started a shift or when we took the train over from a colleague we hardly had time to even greet each other. There was no time for a chat. Well, we also owe a lot to our wives and families. They did not have much fun with us while we worked. With all those shifts, in particular on Saturdays and Sundays and holidays ... We had few days off but there was much overtime work ... ”

The Club's budget has not been based solely on a membership fee (currently the annual fee is 200 CZK) but also on financial support from a related organization in Maloměřice (the branch of the Federation of Train Drivers). There is probably no similar club in the Czech Republic in respect of the scope of its activities and the number of members. It is the first of its kind, we have not come across a similar club in the course of our research.

We think that the hypothesis on differences in attitudes to voluntarism among socio-economic groups (taking into account age, gender, education etc.) was confirmed. As we already pointed out in one of the sections there are more women among elderly volunteers. Naturally, this fact is related to the type of voluntary activity, if the activity involved the social sphere it always involved women. In contrast, in the Pensioners' Union men dominate. If educational activities are involved we again find more women. This is a difference when compared to Norway where the representation of both genders seems to be more even. In terms of education there are most volunteers with secondary education, followed by those with university education. If we look at the age of volunteers then “freshly” retired make up the largest share. Voluntary activating programmes for the elderly thrive above all in larger cities. The reason is clear. In the countryside there is still a number of traditional societies - hunting, fire fighting, local traditions or women's unions. Older people remain life-long members of these societies and are involved in specific activities. In addition to these activities, in the countryside older people often “actually do not have time”. They work in the garden, work on their houses, spend time with grandchildren. If we take into account that there are growing numbers of pensioners in the CR then the level of their involvement in activating programmes has so far been appalling. And we do not think only about participation in programmes in formal institutions. The Czech elderly have thus far not engaged in informal organizing due to a shared interest. Why is it so? We can find the reason in the 40-year long disciplining of the previous political regime. The state attempted to control everything, including the lives of every citizen of the country. The state controlled access to education, assigned places and flats. It allowed and rejected trips abroad, punished the unemployed, built nurseries and kindergartens in order to take over children's upbringing from an early age. People gradually became unused to being responsible for themselves, for their lives. They grew used to the omnipresent state paternalism. The citizen had the feeling that s/he could not do anything anyway which resulted in fatalism. The life trajectories of the inhabitants of then Czechoslovakia were very similar - nursery, kindergarten, vocational school or secondary school, army, marriage, first child etc., one cannot even be surprised about this as life was basically predetermined. One learnt that if s/he did not draw attention to himself/herself, did not differ from the mainstream, s/he could survive even without membership in the Communist Party. Being passive meant being relatively safe. People ceased to have ideals and goals.

For a person who has lived most of his/her life in such a climate it is very difficult to start thinking in a different manner. To start taking care of oneself again, to be responsible for oneself. In higher age one does not even feel like “starting anew”. Dissatisfaction with the current economic and social order on the large part of pensioners also follows from this. Many do not like their current living conditions and nostalgically look back at the old times, we cannot be surprised that they do not share collective values and goals (to be objective this does not only involve older people but also - according to opinion polls conducted after November 1989 - as many as one fifth of the Czech population)¹. Voluntary work is also sometimes approached in a similar vein. During the communist period people learnt that to be involved was dangerous. That is why people retreated into the safety of family life and everything they did was done for the family. Thus because people learnt to mainly look after themselves, it is difficult to become an uncalculating altruist. It is under these circumstances that in the CR the ideals of voluntary work started to be reconceptualized. Currently, as we already mentioned, the situation is more satisfactory yet the changes are far from sufficient. In an ideal case people would be led to voluntarism from their youth. Then it would become part of their lifestyles and in old age a substitute for an occupation.

¹ Source: STEM

As a conclusion let us return to the question of civil society in the Czech Republic. Its existence is a necessary precondition for rooting the voluntarism into the lifestyle of the Czech population. Due to this reason it is also necessary to strengthen the role of the family. Civil society can only stem from natural bonds inside the family and among families in the community. Family provides a natural environment of solidarity and creation of equal opportunities and it is exactly the community of families that can promote these principles. However, thus far - as the European Values Study shows - Czechs in general consider their relationships with people outside the family less important (Možný, 2002).

As we already mentioned, civil society is based on the free association of people to fulfil their interests and needs. It relies on the partnership between the public and the private spheres and activities mediated by non-profit organizations. It is exactly the trust that citizens have in non-profit organizations that has to be constantly strengthened. Activities that would lead to these goals should be significantly supported by the state.

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A later and personal amendment written after the first collective discussion of the results of the Czech case studies with other teams at the consortium meeting in February 2005 in Cracow

Lucie Vidovičová

Some of the Czech case study activities are tailored for small groups (ca 10 people) as they reflect the importance of social relationships which are often the “driving force” behind SOVA. It seems that the social dimension is always one of the most significant features of these activities regardless of the evident motives that lead to their implementation (e.g. education, social care etc.).

Although our sample of SOVA cannot be considered a piece of representative research it appears that the activists involved in them share recurrent socio-demographic characteristics. To a certain extent the patterns of “acquired” altruistic behaviour characteristic of middle class women of the 19th century are replicated. It seems to be the case that even today women, individuals with higher education and higher income dominate among senior activists. Respondents explain women’s higher participation rate by stereotypical characteristics such as “being more adaptable and versatile”, “showing more social empathy” etc. They, however, also give relatively objective reasons for women’s relatively higher participation rate, such as the feminization of the older age cohorts, men’s and women’s differing living arrangements (women tend to live alone more frequently and thus they are more likely to be inspired to activism outside the household) etc.

One of the major barriers to the functioning of SOVA is discontinuous financing. The main report already mentioned the dependence of the large part of the third sector on public financing from the state or regional budget which is further exacerbated by the fact that the financial institutions’ allocation policy changes in annual cycles (this fact can be justified only to a certain degree). The uncertainty linked with the allocation of resources is further worsened by insecurity in respect of the continuity of a programme that has just started as in the annual process of calls for grant applications the area that a call covers also changes. In other words, if one year it is possible to apply for financial support for seniors’ activating projects, the next year the call might be made for projects for handicapped youth and thus it is sometimes impossible to maintain a programme for seniors. Yet even in cases when there are no changes in the areas that are supported a number of projects must re-apply for financial support year after year. This can result in a demotivating atmosphere caused by uncertainty and the perceived waste of energy invested in the organizational work. Some organizations also complain about the extent to which their personnel is burdened by administrative work connected with grant applications and the administration of a project supported by a grant. (According to one of the organizations it is necessary to submit at least 90 grant applications in order to cover part of its costs.)

There also exists a related problem: the absence of a *culture of giving*. For example, corporate charity has not yet become a constitutive part of a firm’s image, it is developing very slowly and only in preferred areas (youth and sport). Moreover, it often has the shape of sponsoring rather than charity. This can also be caused by the fact that the private sector faces a relatively high tax burden and spends the laboriously earned profits on its own pleasures rather than using them for positively influencing the surrounding world. This system though influences not only support for the non-profit sector but also the underdeveloped systems of investments into human resources in the form of training or care for employees’ occupational health.

In their essence the activities of NGOs also function like firms that search for strategies in competition with other non-profit organizations. Competition occurs mainly in access to financial resources (not so much in terms of access to clients) and thus we can detect a kind of enmity, respectively carefulness, among NGOs. The only co-operation that the respondents mentioned was informational, i.e. the sharing of information about the activities of individual organizations, however, the organizations’ networking in the Czech Republic is by some observers understood as insufficient and failing. This, however, is typical above all of the problems of bigger and hierarchically more organized activities, among these we though do not find many seniors’ SOVA.

In interviews with representatives of selected SOVA the problem of “the stereotypical approach to seniors and old age” was repeatedly mentioned as one of the barriers to the development of these activities in CR. It is, nonetheless, a question whether this involves a kind of a stereotype about a stereotype. The stereotyping of old age is often understood as a universal problem, however, only a few could identify its foundations and its causal relationship with the low involvement of Czech seniors. It remains a question whether the cause of inactivity lies more in disinterest and laziness rather than in a stereotypical approach to seniors. To a certain degree we could consider the following approach a more logical one: “I do not like the stereotypical approach to my person - I get out and try to change it”.

Accusations of stereotyping ageing actually suggest the following stance: "I do not like it but I give up on change" or "I actually do not care".

In the interviews there was a single insinuation of a concrete demonstration or consequence of stereotypical even ageist atmosphere as an inhibiting factor in the development of SOVA and that in the field of social and health care provided to seniors. Respondents insinuated that complicated personal situations in which seniors in need find themselves paradoxically "discourage" volunteers from more engagement in this area. In the words of one of our respondents: it is not difficult to find volunteers to work with children but in the case of seniors it is more difficult.

Apart from the society's stereotypical approach to old age and seniors, the lack of financial resources or information is equally often blamed for low levels of engagement. This partly involves interconnected issues - where there is little will, few possibilities and limited financial resources then there is also a lack of information and vice versa. In addition the competitive environment characteristic of big NGOs does not encourage shared information campaigns (a rare positive development is, for example, the by now traditional information-fundraising campaign "Thirty days for the non-profit sector"). Despite that in the case of seniors' SOVA these objections should be taken with a pinch of salt. We can expect that one of the underlying characteristics of SOVA is akin to spontaneous action, an active reaction to an arising need. I can give a banal example: how big an information campaign and how much money are required in order for neighbours to make an arrangement and teach old trades at the primary school in the after-school hours? That is why I think that the objective and general barriers such as stereotypization, under-funding and seniors' relatively low knowledge of possibilities for self-realization are not completely legitimate reasons for seniors' low levels of engagement. After all, examples of good practices mentioned in the main report support this thesis. (This principle is expressed in the proverb: Where there is a will there is a way.)

To a large extent involvement in SOVA depends on individual socio-psychological determinants. Structurally it is only possible to create such conditions that enable those who want to participate to take part in SOVA, I, however, have doubts in respect of using structural measures to enlarge the number and scope of SOVA. The expected social transformation (overcoming path dependency) constitutes a different question. It is often understood as a solution to all problems but it cannot be rushed.

The issue of the normative approach to the evaluation of the findings of the study and in particular its comparative dimension is open for discussion. Is the situation in CR bad in respect of SOVA, is it worse than in Norway? Or is it "only" different? Is the unwillingness on the part of Czech seniors and also people of a younger age a characteristic of a lower developmental stage of society? If yes, why is it the case? Reasons behind an affirmative answer to these questions stem mainly from looking into the distant albeit not so remote past of CR. In particular since the second half of the 19th century, at the symbolic peak of the period of the First Czechoslovak Republic (1918), various societies, voluntary and charitable organizations developed intensively. Thus it is impossible to say that this tradition is alien to the Czech nation. However, the intensity with which this tradition was interrupted by war and in particular post-war developments, lowered the levels of empathy felt for the people around. There are two additional influences and those are completely contemporary. On the one hand, it is the relatively painstaking process of transformation which defined a system of priorities at a time when questions relating to the development of civil society were clearly overshadowed. With the transformation, above all with its economic part, there occurs a whole range of transitory changes in the value systems of the inhabitants of CR. And these do not seem to have any connection with the "good old tradition" of pre-war years. Certain signs of anomie, development of post-materialism and a significant shift away from the Protestant (or Western Christian) ethic shapes a number of attitudes which are not very favourable for activities of the SOVA type. Thus I am inclined to conclude that in its approach to SOVA the Czech Republic is definitely different from Norway and in case we agree that SOVA characterize cultural development then CR is certainly in a worse state. At the same time it seems to be the case that Czechs are hardly aware of this clearly qualitative difference in this area and thus feelings of inferiority or inadequacy in this area are not so strong as e.g. when comparing the purchasing power of the Norwegian and Czech pensioners. Subjective poverty (by the way not at all corresponding to objective poverty) is given more expression than the growing feeling of loneliness in old age. It is still more natural to look for problems rather than take part in the solving of problems that reach beyond the individual. I personally think that SOVA could actually be the most natural solution to both.

5 Self-oriented voluntary activities, their relation to active ageing policies, and contribution to active ageing

The previous three chapters of this report dealt with similarities and differences of the history, life-situations, attitudes, perceptions and behaviour of older persons in different European countries and regions, which constitute also different frameworks for the frequency and likelihood of self-oriented voluntary activities. In spite of the predominantly descriptive character, the hidden normative message about SOVA, voluntary work and civic engagement of older persons was a positive one: Countries with more such activities of older people are better-off than the other ones and those lagging behind should try to catch-up in this respect as well. In the two following sections, the report will become explicitly normative and discuss the possible contribution of SOVA to active ageing, active ageing policies and to the fulfilment of collective goals of the society in general. The following text written by Steven Ney, the co-ordinator of the ActiveAge project, deals not only with positive functions and contributions of SOVA, but also with some negative aspects and problems which are often overseen by uncritical SOVA's proponents.

SOVA, Civil Society and Active Ageing: Visions and realities

Written by Steven Ney, ICCR Vienna, Co-ordinator of the ActiveAge project

The preceding sections have fathomed the civic potential among older people in Europe both in quantitative and in qualitative terms. While the case studies show SOVA in Norway and in the Czech Republic are similar both in orientation as well as in the membership, the quantitative analysis has brought to light significant discrepancies in the way older people in different European countries perceive life and spend their time. What does all this mean for active ageing strategies and practical policy responses to demographic ageing? In the following section, the report will critically discuss the potential contribution of SOVA to active ageing strategies. It will do this by contrasting the way proponents of active ageing envisage the future role of SOVA in an ageing society with some of the barriers that emerge from our analysis.

The Future Role of SOVA in an Ageing Society

SOVA in particular and voluntarism in general play a pivotal part in the vision of an actively ageing society. Regardless of whether proponents advocate the strong programme of active ageing as holistic life course management or the less comprehensive interpretation of active ageing as a means to tap into resources of older workers, voluntarism and SOVA are to play a central role in active ageing in two distinct senses. Different perceptions and interpretations of active ageing strategies generate divergent visions of an ageing civil society and the role of voluntary work. Approaches that equate active ageing with maintaining economic productivity tend to envisage a more direct role for SOVA in service provision. In contrast, more expansive and emancipatory active ageing strategies see SOVA and voluntary work as an indirect but far more fundamental socio-cultural force.

SOVA as Future Service Providers

Whatever else active ageing may be about, a central aim of the concept (regardless of particular flavour) is to control and reduce expected social costs of demographic ageing. Pretending otherwise is simply disingenuous. In a very real sense, active ageing strategies are about finding relatively painless and profitable adjustment pathways for ageing European societies. In an ageing society, so the argument goes, the demand for a wide range of services, most prominently health, care and social services, is likely to increase while the financial and personnel basis of service provision will shrink. In essence, much of the divisive and bitter debates about the adjustment process to demographic ageing witnessed in Europe in the last decade have been about finding ways of bridging this shortfall between demand and supply.

To date, policy-makers across Europe have concentrated their efforts on controversial systemic reforms aimed reducing costs by reconfiguring social security and health care systems. However, policy-makers have come to realise that, difficult and incisive as these reforms may have been, they alone will not enable policy actors to meet the expected growth of demand for services. In addition to encouraging workers to remain in the labour force for longer (primarily by discouraging early retirement) and enforcing cost control on health care systems, policy-makers are looking for ways to tap into the productive potential of older people after they have left the formal labour market. Since the so-called 'new' or 'young' old - the generations presently at or close to retirement age –are fitter, more affluent, and better educated than previous cohorts, so the argument goes, it is tantamount to fraudulent waste to let these valuable societal resources dissipate into the inactivity associated with conventional retirement life-styles in Europe.

An efficient way of accessing these resources, proponents argue, is to encourage the voluntary and charitable provision of services to older people. In the future, so the argument goes, a wide diversity of voluntary organisations (including but not limited to SOVA) will supply an increasingly wide range of services. Although the main focus will be on the care and social services of older people, voluntary organisations and SOVA are also to provide services in education and training as well as in culture and entertainment.

In this way, so the argument goes, voluntary work will breach the growing gap between the demand and the supply of care, health and social services. On the one hand, voluntary work – particularly in the care sector – in to be an important alternative resource to informal family care. Increasing mobility, growing female labour market participation, as well as the transformation of family structures point to a profound reduction in the capacity for care within the family, SOVA and voluntary work, proponents contend, can not only help pick up the shortfall of informal family care but also provide assistance and support to existing informal family carers. On the other hand, increased reliance on voluntary organisations, including SOVA, is supposed to relieve the pressure on public providers of services for older people. Voluntary work by the 'young old', so the argument goes, will replace lost capacity and thereby will make scarce public resources in care, health and social services go a longer way.

SOVA as Social Capital

Apart from reducing and controlling the costs of demographic ageing, active ageing is also a project of fundamental socio-cultural change. This is particularly true for holistic and comprehensive interpretations of the concept. Here, active ageing signifies a society fit for an age-diverse population: whether in the work place, the family, or the political system, active ageing means full civic integration and inclusion of citizens regardless of age. Significantly, this presupposes a profound change in both attitudes and socio-cultural structures. Proponents understand voluntary organisations, but particularly SOVA, to be a crucial element of this socio-cultural transformation for three closely related reasons.

First, by providing the 'young old' with an appropriate organisational framework for increased civic engagement, SOVA foster the kind of active lifestyles required for full social citizenship of older people. By encouraging voluntary work, social contacts, physical activity, hobbies and socio-cultural interaction, SOVA have a critical function in promoting patterns of behaviour that contribute to both physical and mental health of people as they age. Quite apart from cost reductions due to care services foregone, proponents argue, SOVA can equip people with the civic skills, knowledge resources and life-styles necessary for a full social, cultural and political participation.

Second, promoting and supporting SOVA not only fosters active life-styles but also helps construct the socio-institutional infrastructure necessary for an age diverse society. On the one hand, creating an institutional context for voluntary service provision and civic engagement means that the young old have real choices and options of services as they age. On the other hand, socio-institutional networks provide the organisational preconditions for effective self-determination and autonomy. SOVA, so the argument goes, are vital for releasing older people from dependency on the labour market, families or the state. This is particularly true for older people of the future who will not have the financial resource to opt out of either family or public care.

Third, SOVA can help dismantle the perceptual and attitudinal barriers to an age diverse society. By providing older people with the opportunity for civic engagement, SOVA help older people demonstrate their potential societal contribution to other generations as well as to themselves. By providing services as well as by constructing a space for effective civic engagement, proponents contend, SOVA will be the initial locus and starting point for the comprehensive socio-cultural renewal process. By enabling and empowering older people at social, economic and political levels, SOVA will provide the socio-institutional vanguard of the active ageing transformation process.

In sum, SOVA and voluntary organisations are an integral element of any active ageing strategy. For conceptions of active ageing oriented primarily towards the maintenance of older peoples' productivity and the control of ageing-related costs, SOVA in particular and voluntary organisations in general are a valuable alternative resource for direct service provision. For more comprehensive interpretations of active ageing, SOVA occupy a central role in the creation and cultivation social capital for age-diverse societies.

Barriers and Issues

The quantitative analysis of the previous sections show that SOVA for older people will need to grow and consolidate in order to contribute to a successful active ageing strategy of whatever flavour. Given their central position afforded to SOVA, the success or failure of active ageing strategies depends to a large degree whether policy actors will be able to expanding and deploy SOVA and voluntary organisations. What, then, does our analysis tell us about SOVA as a pillar of future active ageing strategies in particular and social policy in general?

Specifically, the analysis points to problematic areas concerning both the direct service provision function as well as the more fundamental social capital role proponents envisage for SOVA. Moreover, the basic requirements for promoting and fostering successful SOVA (in either sense) is fundamentally at odds with the prevalent restrictive climate of evidence-based policy-making.

SOVA are a Long-Term Remedy for Service Provision

In a very real sense, using SOVA and voluntary organisations for bridging the shortfall between rising demand for services and declining financial ability to supply these services is not a policy option that can deliver concrete savings in the short- or medium-term. This is the case for two interrelated reasons.

First, in order to function adequately, that is not to unduly lower the quality or coverage of services for older people, this policy option will require considerable prior investment. For SOVA to effectively replace and complement informal family care on the one hand as well as public care on the other will require new forms of service provision based on the management of increasingly heterogeneous organisational policy networks (Rhodes, 1997). To date, experience as well as competences of this type of service provision are for the most part non-existent or, where relevant, limited. Therefore, promoting and supporting service provision in heterogeneous organisational networks will require considerable long-term public commitment in terms of research, experimentation, and training if these forms of service provision are to pay off. This is why policy-makers cannot expect effective savings in the short- and medium-term.

Second, the analysis of this work package have show that there are considerable institutional path dependencies involved in the development and evolution of SOVA. Countries analysed by the ActiAge consortium show a wide range of different socio-institutional forms of voluntary association. While the case studies show SOVA in different countries are similar at a qualitative level, the quantitative analysis reveal large societal discrepancies between different countries. In other words, while it would seem that the structures, norms and practices of SOVA are reasonably similar across national and regional borders, the proportion of people ascribing to these structures, beliefs and practices differs enormously. This means that countries and regions with relatively strong institutional traditions of voluntarism and self-organisation, the expansion and deepening of SOVA-based service provision will be relatively less difficult than for countries with weak institutional traditions of SOVA.

However, these relative discrepancies and path dependencies are far more than mere blemishes: they signify divergent pathways of institutional evolution. In order, then, for SOVA to take on the additional service provision functions, policy actors will have to bring about a profound reorientation of socio-institutional structures and practices. Common sense as well as recent research into institutional change (Pierson, 1994, 1996, 2001; Esping-Andersen, 1990; Sabatier and Jenkins-Smith, 1999) suggests that these sorts of socio-cultural transformations are long-term societal projects with a very uncertain prospect of success.

In sum, mobilising SOVA for the provision of care, social and health services will require considerable long-term commitments of all policy actors involved.

Whose Social Capital?

At the more fundamental level, the idea of SOVA as the core of future age-diverse civil society is also fraught with difficulties. First, SOVA transport a strong normative message of empowerment and self-

determination into the public sphere. They do this both explicitly (in the case of SOVA with an avowedly political mission) or implicitly (by demonstrating the ability for self-determination and empowerment). However, not everyone (regardless of the particular age) may agree with this normative message. In fact, the relative scarcity of existing SOVA, their age and gender structure as well as their real impact suggest that many people are not wholly convinced of either the fundamental idea of empowerment or of the particular brand of self-determination on offer by SOVA. In this sense, the type of civic space SOVA create is not as diverse as proponents of a more comprehensive active ageing concept assume. For example, SOVA cannot represent the Groucho Marx's of the future (who would never join a club that would accept them as a member). In order, then, to avoid SOVA's very specific view of empowerment, citizenship and active ageing to monopolise the space for civic engagement of older people, policy-makers need to preserve (or, in many cases, create) a variety of different organisational forms of civic participation.

Second, not only do path dependencies raise thorny questions of the practical feasibility of expanding and deepening SOVA, they also give rise to more fundamental concerns about legitimacy. Much of the strong programme of active ageing is based on the unquestioned assumption that the socio-cultural shift implicit in the expansion and deepening of SOVA is universally positive and beyond criticism. However, the strongly egalitarian and emancipative concept of empowerment and self-determination underlying this particular vision of social capital and civic engagement is by no means the only legitimate approach to social capital or civic participation. By extension, age is not the only and not even the most important source of diversity in societies. While age diversity is an important aspect for the civic participation of older people, other forms of social commitments will continue to shape the perceptions and beliefs of older people. An expansion of SOVA at the cost of other forms of civic engagement (parties, firms, religious groups, etc.), then, will reduce rather than expand the options for civic participation by narrowing the choice and variety in the public sphere.

SOVA as an 'Unreliable Resource'

The value and potential contribution of SOVA to active ageing strategies and social policies of the future lies precisely in those characteristics that are fundamentally beyond the direct control of policy-makers. Research suggests that vibrant public spaces populated by effective SOVA and other forms of civic engagement evolve from a complex and unpredictable historical process. While social capital certainly is an evocative metaphor, it is also a little misleading since it implies some degree of linearity and control. It follows that fostering and promoting the kinds of institutional structures, norms, and practices to provide services and break down age discrimination is anything but a precise science. Socio-institutional evolution and the growth of civic spaces are not amenable to precise measurement, quantification or evidence-based evaluation. In issues of civic participation and deliberation, no amount of research or evaluation will provide authoritative insight into 'what works'. The social embeddedness of SOVA means that what works in one place at a certain time need not work elsewhere later. These evolutionary processes are by definition circular, argumentative and notoriously difficult to steer: if they are not, they are of no value for society, policy-making and active ageing.

Thus, fostering and cultivating SOVA will require the type of support and funding increasingly unpopular with policy-makers and tax-payers in times of "permanent austerity" (Pierson, 2001). Policy-makers will have to continuously invest scarce resources to provide an adequate framework for civic spaces of an age-diverse society to develop into the types of networks capable of absorbing the pressures of demographic ageing. However, any attempt to steer or control these processes is unlikely to result in an effective civic space for senior citizenship.

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